

Sopima - User Manual – Master users

3.0.5

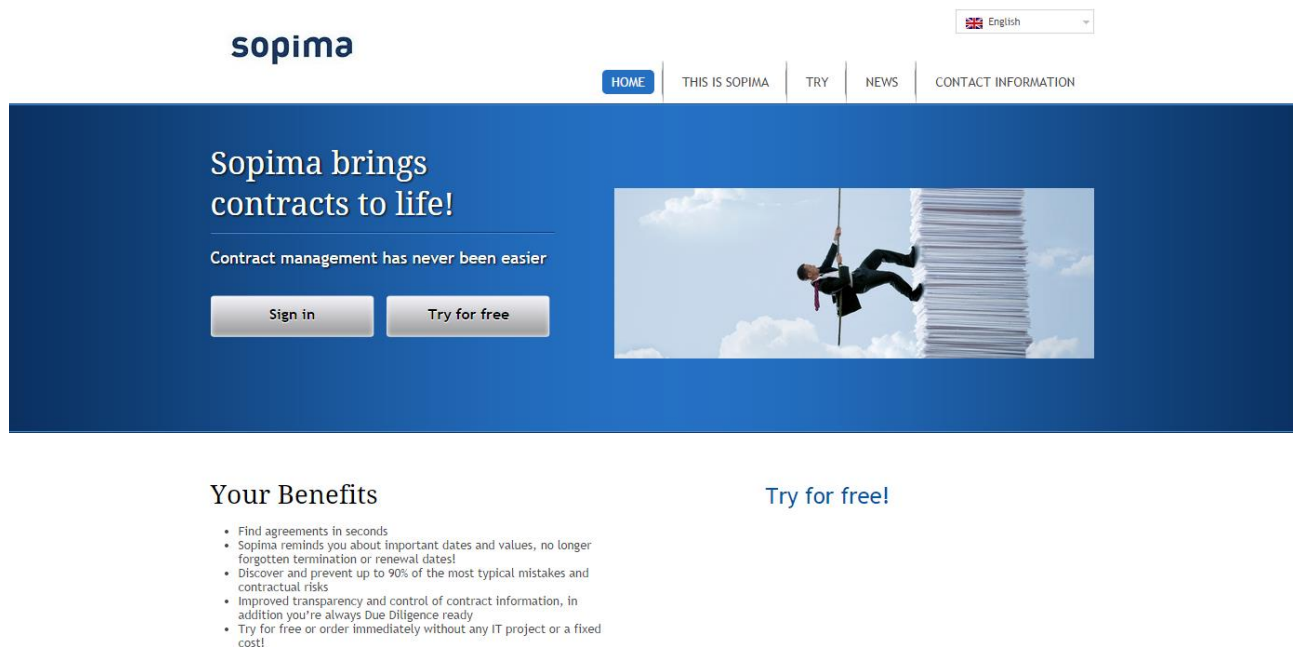
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1 Identity website

1.1 How to register for a Sopima account and create an organization

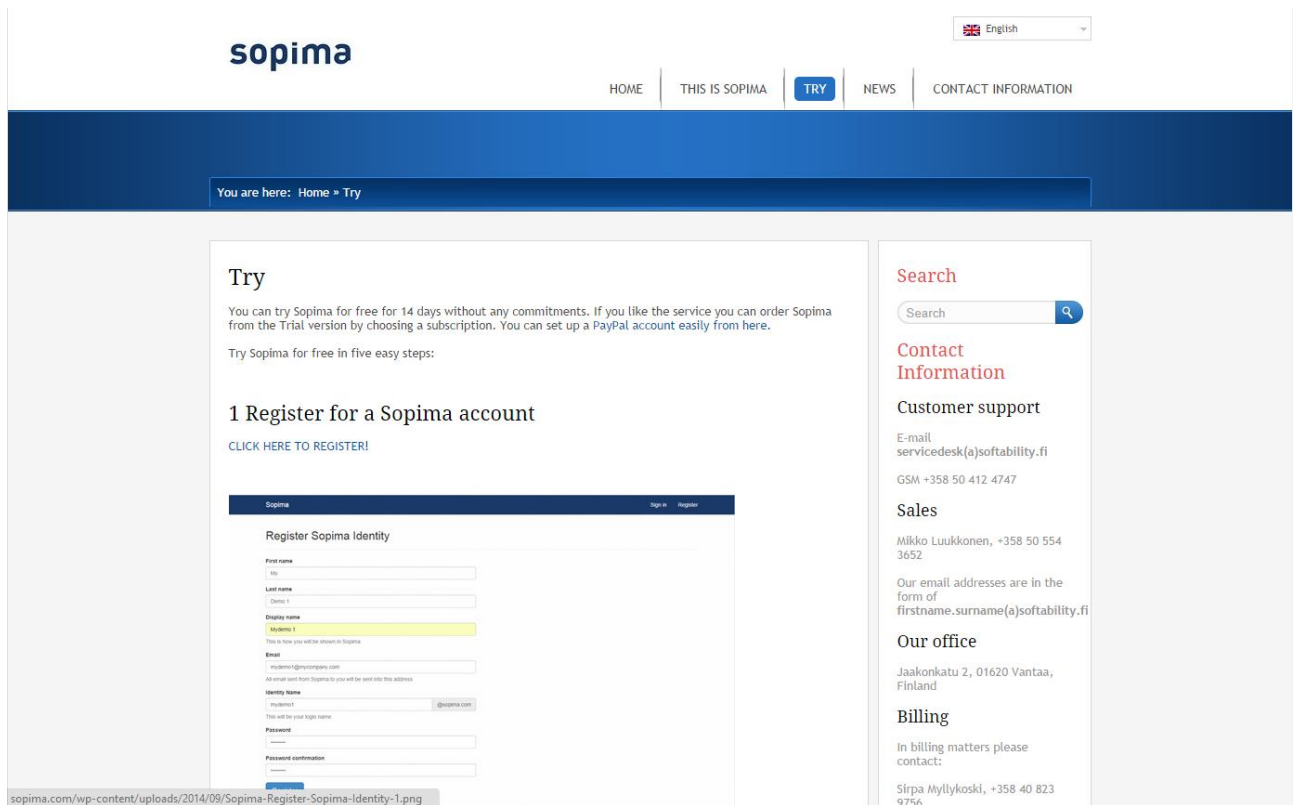
Go to www.sopima.com website and click on “Try for free” button.



Picture 1. www.sopima.com website – Front page.

Click the “CLICK HERE TO REGISTER!” link.

You can read the instructions contained on this website page but the same things will be covered in this user manual.



Picture 2. www.sopima.com website – Try.

You are transferred to the Identity website where you can register a new user for Sopima.

Input your first and last name.

The display name is shown on the Sopima website.

The email address is required for you to confirm the registration so make sure it is a correct one.

The identity name is your login name to the Sopima website and is of the type myIdentity@sopima.com.

Input and confirm your password.

Click the “Register” button.

Sopima

Sign in Register

Register Sopima Identity

First name

Test

Last name

Tester

Display name

Test Tester

This is how you will be shown in Sopima

Email

test.test@mycompany.com

All email sent from Sopima to you will be sent into this address

Identity Name

test.test @sopima.com

This will be your login name

Password

Password confirmation

Register

3.0.1

Picture 3. Identity website – Register new user.

Check your email and look for the “Account confirmation” email.

Click the confirmation link contained within that email.

You are transferred to the Identity website informing you that your Sopima account has been activated.

Sopima

Sign in Register

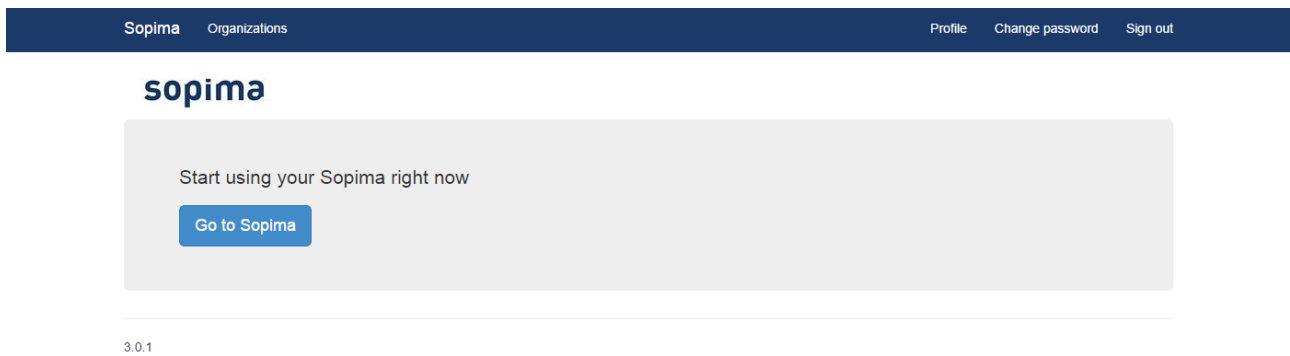
Account activated

Picture 4. Identity website – Sopima account activated.

Next click the ‘Sign in’ link at the top. Remember your username is of the type myIdentity@sopima.com.

When you have signed in you are shown the front page of the Identity website.

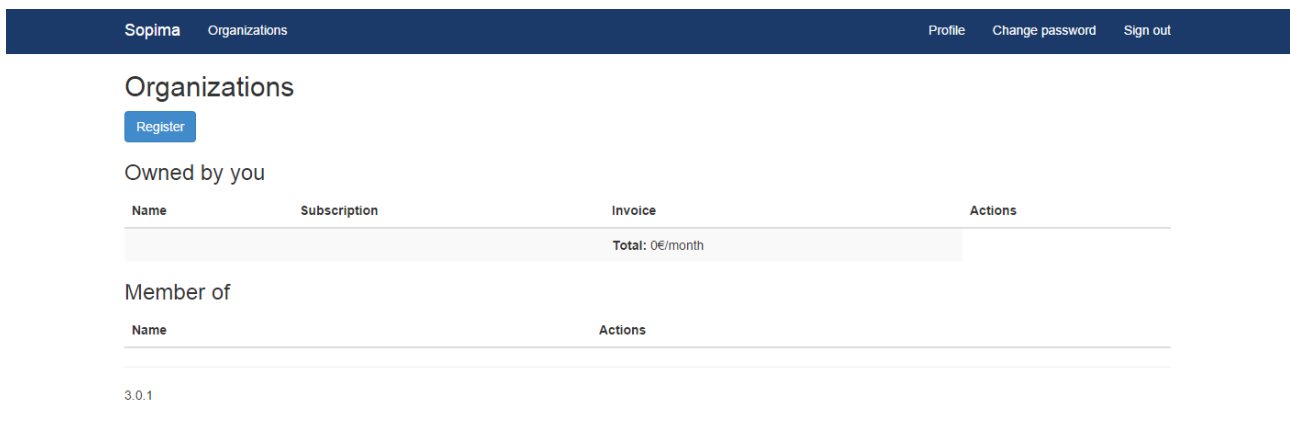
Click the “Organizations” link in the top navigation pane.



Picture 5. Identity website – Front page.

You are shown the organizations that you have registered (Owned by you) and the organizations into which you belong to through an invitation (Member of).

Create a new organization by clicking the “Register” button at the top.



Picture 6. Identity website – Organizations.

Input the name of the organization.

Choose a Time zone from the drop down menu.

Input the address of the organization. This can be a visiting, mailing or invoicing address.

Choose a subscription: Free Trial or Order Sopima.

Click Register or Cancel the creation of a new organization.

Register

Name
TestOrganization

Owner Test Tester

TimeZone
Europe/Helsinki

Address
Test address 1, Helsinki, Finland

Trial
Trial use of Sopima for 14 days
Price: 0

Register Cancel

3.0.1

Picture 7. Identity website – Register organization.

You have registered an organization and chosen a subscription (Trial in the example).

Organizations

Register

Owned by you

Name	Subscription	Invoice	Actions
TestOrganization	Trial	0€/14 days	Details Members Delete

Total: 0€/month

Member of

Name	Actions
------	---------

3.0.1

Picture 8. Identity website – Organization registered.

1.2 How to invite users to an organization

Click on the “Members” button on the Organizations page.

Organizations

[Register](#)

Owned by you

Name	Subscription	Invoice	Actions
TestOrganization	Trial	0€/14 days	Details Members Delete

Total: 0€/month

Member of

Name	Actions
------	---------

3.0.1

Picture 9. Identity website – Organizations.

On the Members page you see all the members of the chosen organization and the pending invitations.

Click on the “Invite users” button.

Members [Manage organization members](#)

TestOrganization

Name	Identity	Email	Actions
John Doe	john.doe@sopima.com	john.doe.sopima@gmail.com	
Jane Doe	jane.doe@sopima.com	jane.doe.sopima@gmail.com	Delete

Invitations [Pending members](#)

[Invite users](#)

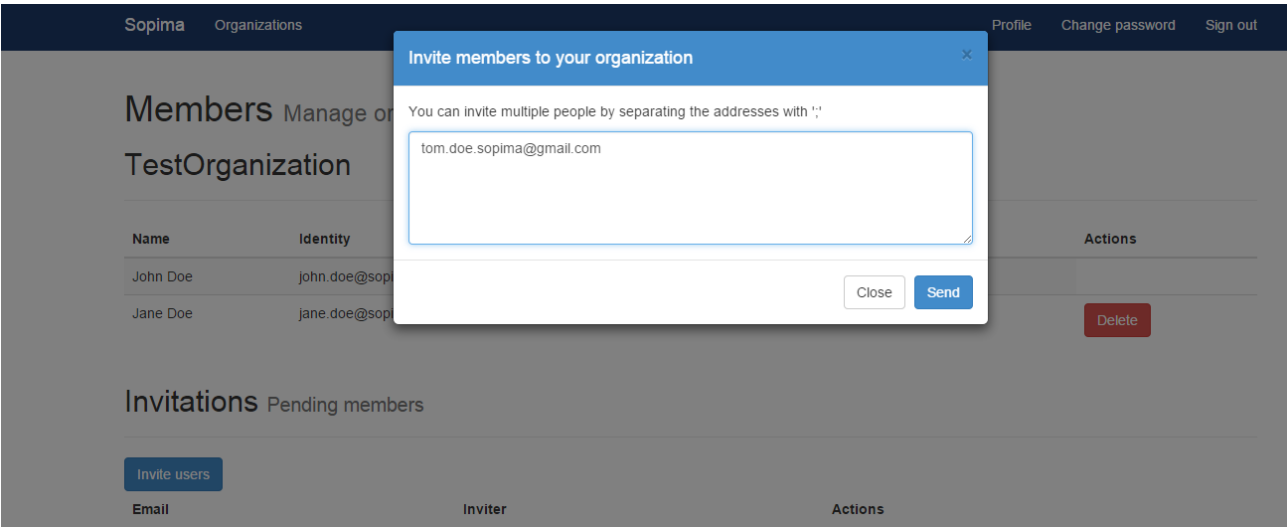
Email	Inviter	Actions
-------	---------	---------

3.0.5

Picture 10. Identity website – No invitations at the moment.

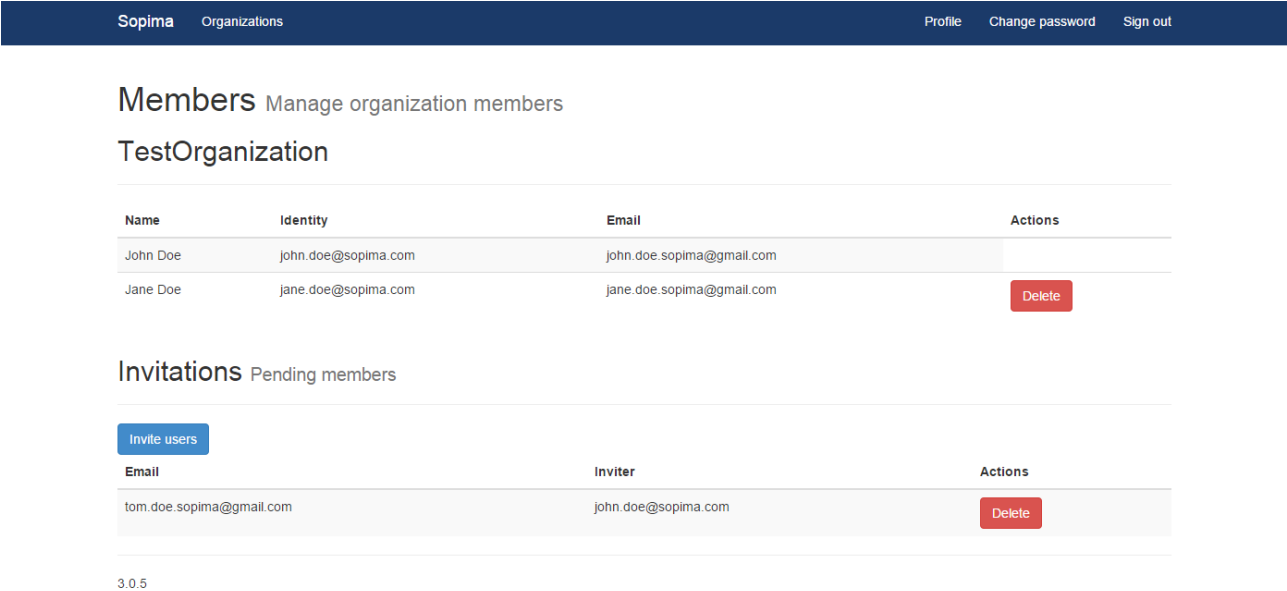
You can invite multiple people by separating the email addresses with a “;” character.

Press “Send” button or “Close” button to cancel the invitation.



Picture 11. Identity website – Invite members to your organization.

You can see the invited users in the Invitations (Pending members) section of the current page.



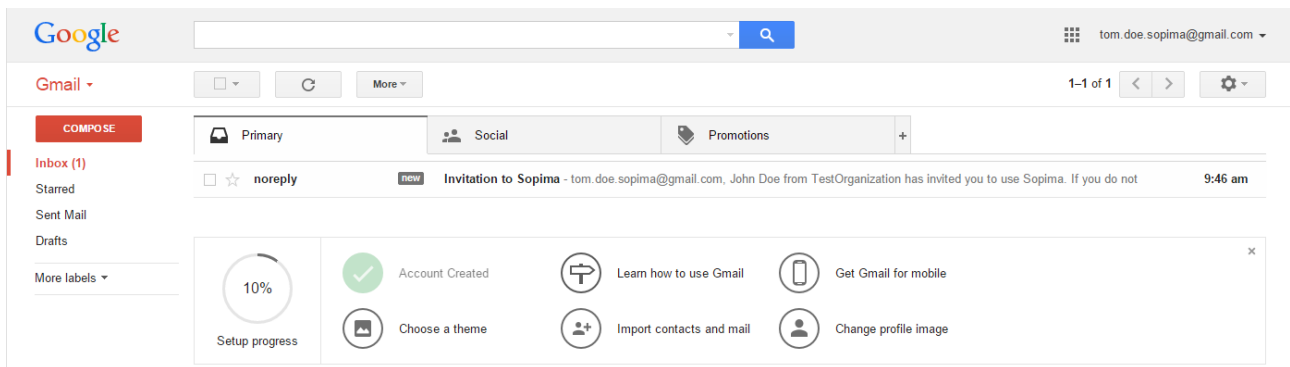
Picture 12. Identity website – One invitation at the moment.

1.3 How an invited user registers to Sopima

You will receive an invitation to your email address.

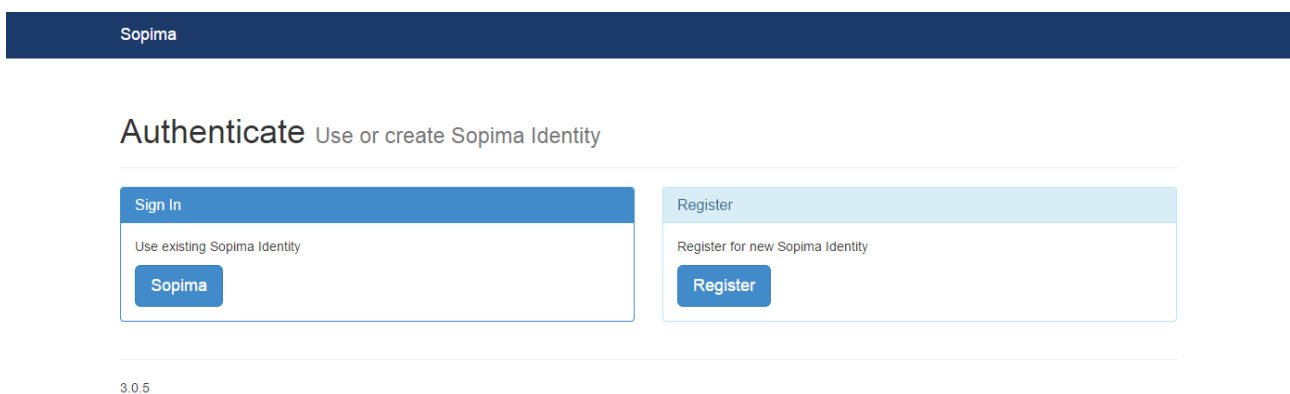
If you cannot see it, check whether the invitation is in the junk email folder.

Click on either link contained within the email.



Picture 13. Sopima organization invitation email.

You are transferred to the authenticate page.



Picture 14. Identity website - Authenticate page.

1.3.1 Signing in with an existing account

If you have an existing account then click on the blue “Sopima” button on the left.

You can skip to section 1.3.3.

1.3.2 Registering a new account

If you do not have an existing account then click on the blue “Register” button on the right.

Input your first and last name.

The display name is shown on the Sopima website.

The email address is required for you to confirm the registration so make sure it is a correct one.

The identity name is your login name to the Sopima website and is of the type myIdentity@sopima.com.

Input and confirm your password.

Click the “Register” button.

The screenshot shows the 'Register Sopima Identity' form. At the top, there is a dark blue header with the 'Sopima' logo on the left and 'Sign in' and 'Register' links on the right. The form itself is titled 'Register Sopima Identity' and contains several input fields: 'First name' (with 'Tom' entered), 'Last name' (with 'Doe' entered), 'Display name' (with 'Tom Doe' entered), 'Email' (with 'tom.doe.sopima@gmail.com' entered), and 'Identity Name' (with 'tom.doe' and '@sopima.com' entered). Below the 'Email' field, a note states: 'All email sent from Sopima to you will be sent into this address'. Below the 'Identity Name' field, a note states: 'This will be your login name'. There are also fields for 'Password' and 'Password confirmation', both containing six asterisks. A blue 'Register' button is at the bottom of the form. At the very bottom of the page, the version number '3.0.5' is displayed.

Picture 15. Identity website – Invited user registers for a Sopima account.

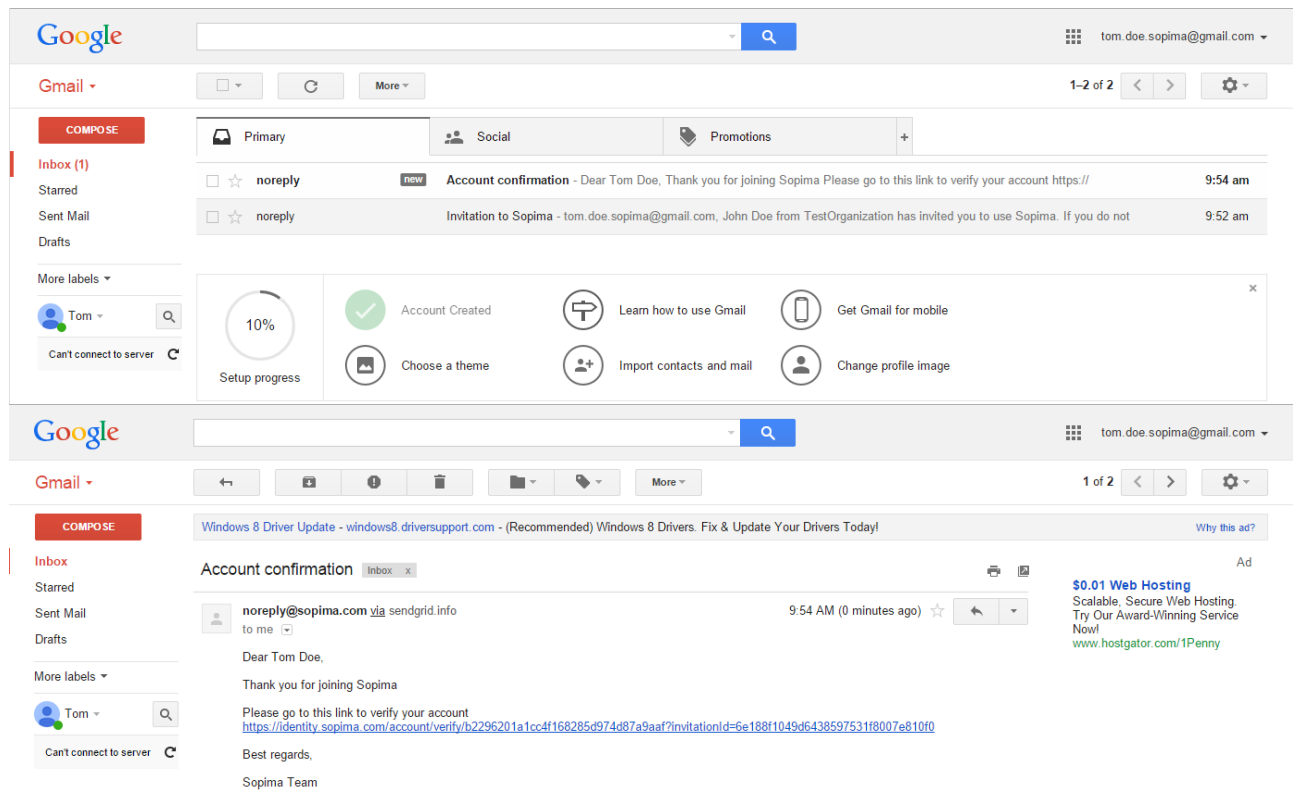
The new account needs to be activated.

The screenshot shows an email from Sopima. The header is a dark blue bar with the 'Sopima' logo on the left and 'Sign in' and 'Register' links on the right. The body of the email is white and contains the text: 'Tom Doe, Thanks for signing up for Sopima. Please go to your email to activate your account.' At the bottom of the email, the version number '3.0.5' is displayed.

Picture 16. Identity website- Account needs to be activated.

Check your email and look for the “Account confirmation” email.

Click the confirmation link contained within that email.



Picture 17. Sopima account confirmation email.

You are transferred to the Identity website informing you that: “Account activated. You are now part of the organization you were invited to”.

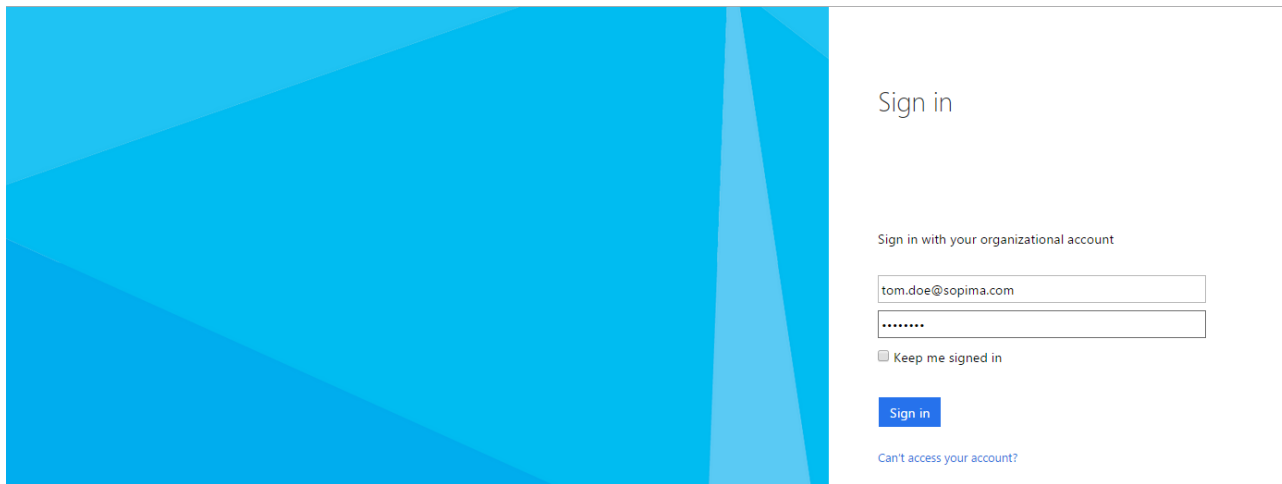


Picture 18. Identity website – Sopima account activated and user is part of an organization.

1.3.3 Sign in to the Identity website

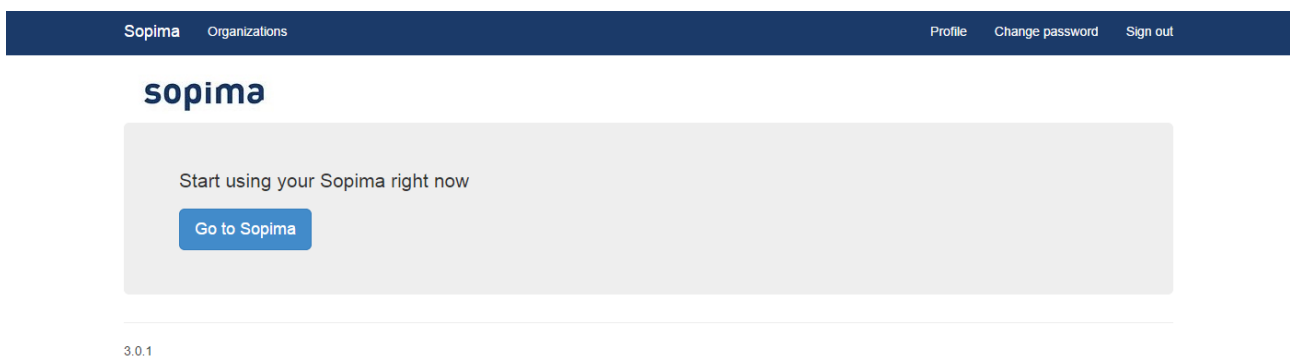
Next sign in to the Identity website with your new account.

The login is of the form myIdentity@sopima.com.



Picture 19. Identity website – Sign in.

You can start using Sopima by clicking on the blue button called “Go to Sopima”.

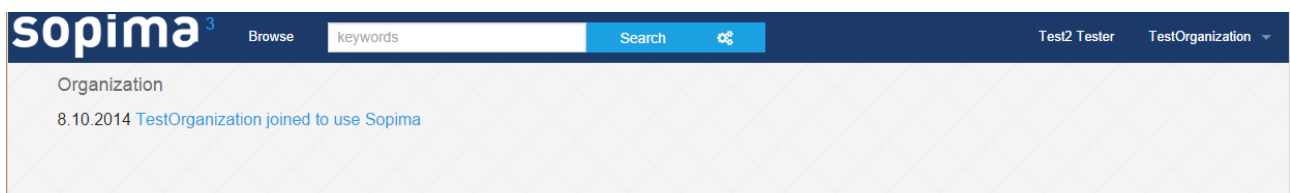


Picture 20. Identity website – Front page.

Welcome to Sopima!

The organization’s owner will see that you have joined her organization and will assign you to the proper user group.

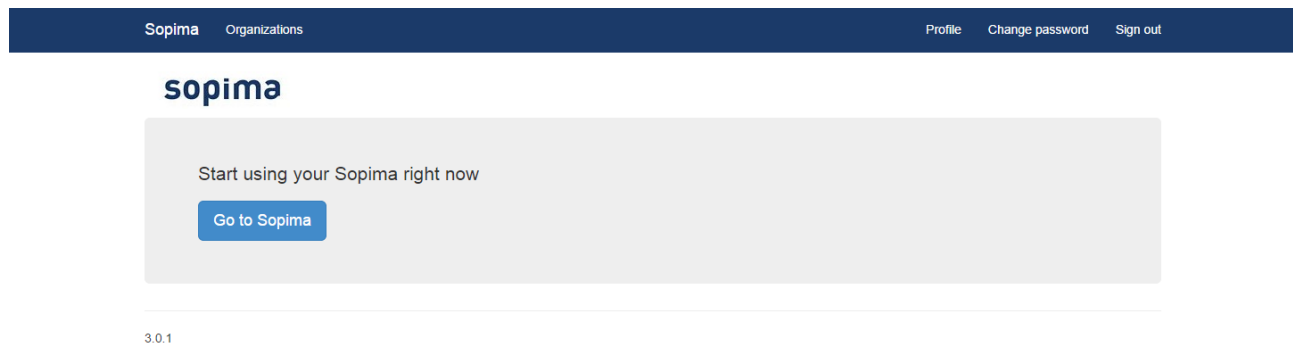
After you have been assigned to a user group you can start using Sopima.



Picture 21. Sopima website – Front page.

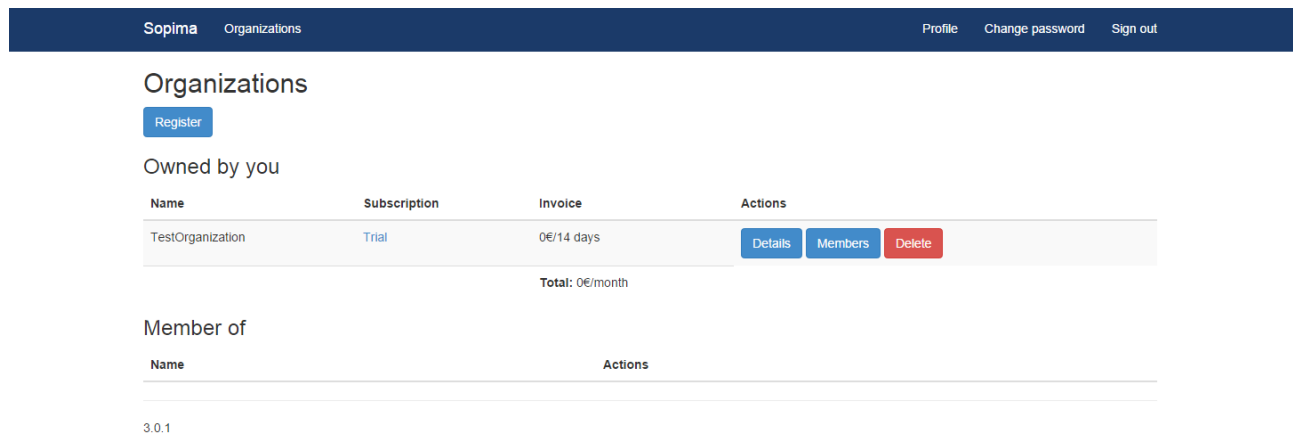
1.4 How to order Sopima or change your subscription

Start by clicking “Organizations” from the top menu.



Picture 22. Identity website – Front page.

You are shown the organizations you own and are a member of.



Picture 23. Identity website – Organizations.

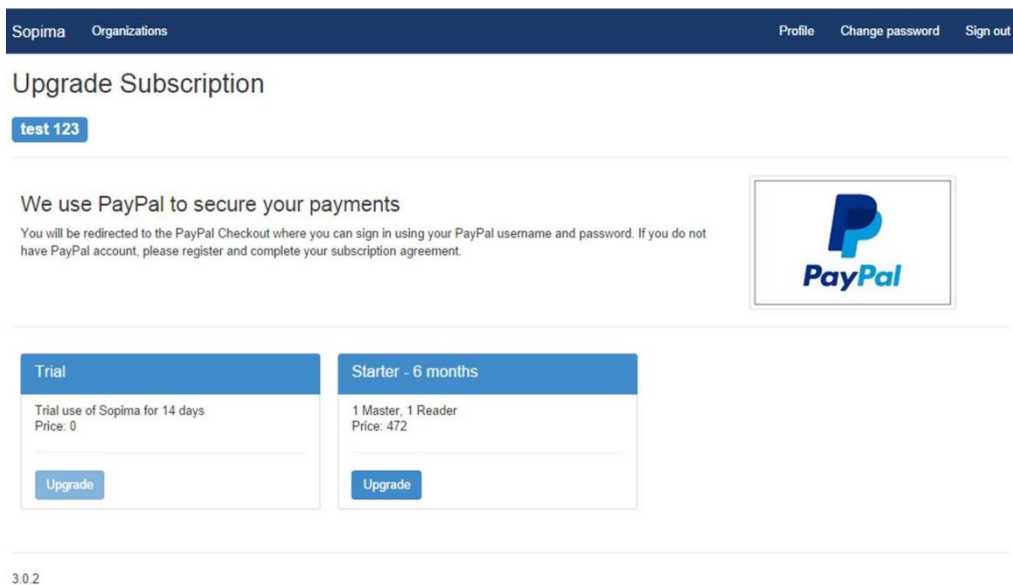
Click the value below the “Subscription” column for the organization whose subscription you want to change.

In this demo there is only one organization called “TestOrganization” and its current subscription is “Trial”.

You need a PayPal account to order Sopima. You can create a free PayPal account by clicking on the PayPal –logo on the right. It will transfer you to the official PayPal website at www.paypal.com.

You change the subscription by selecting one of the offered: a certain number of MASTER and READER users clicking on the “Upgrade” button.

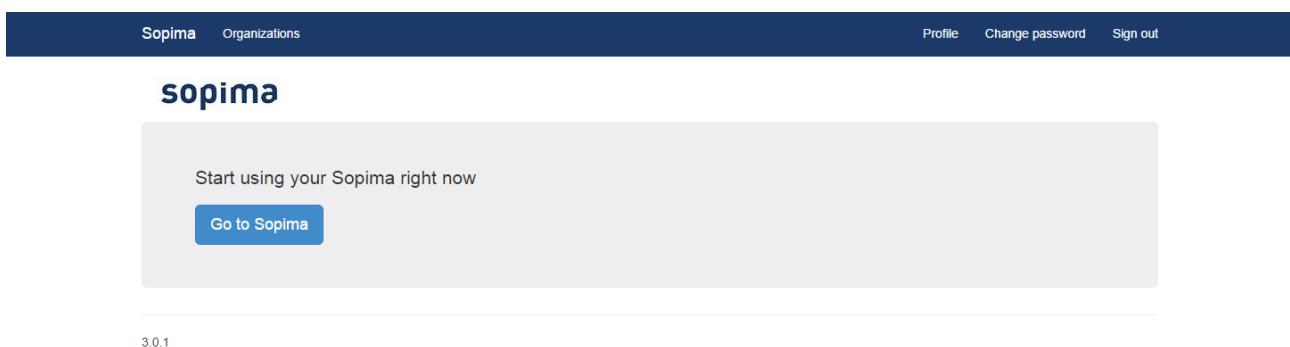
Upgrading (excluding Trial version) will ask the user to sign in with their company PayPal account. If the company does not have a PayPal account the user can create one from the link offered.



Picture 24. Identity website – Update Subscription.

1.5 How to modify your user information

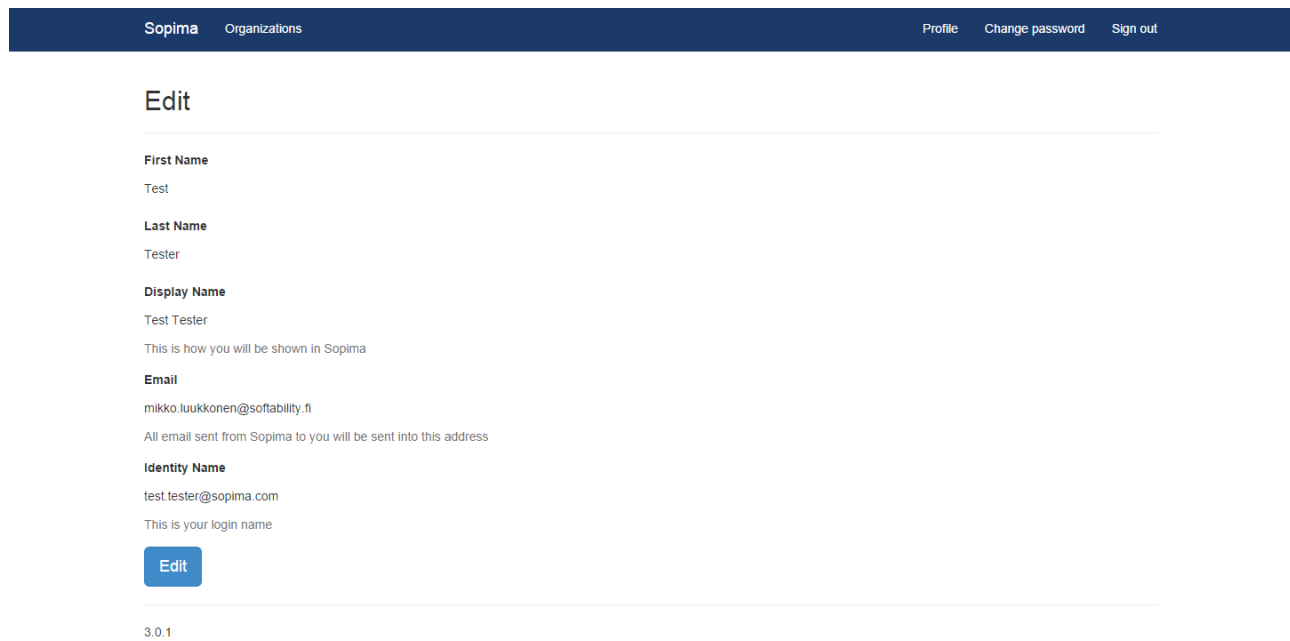
Start by clicking “Profile” from the top menu.



Picture 25. Identity website – Front page.

You are shown your current user information.

Click the “Edit” button to modify the information.

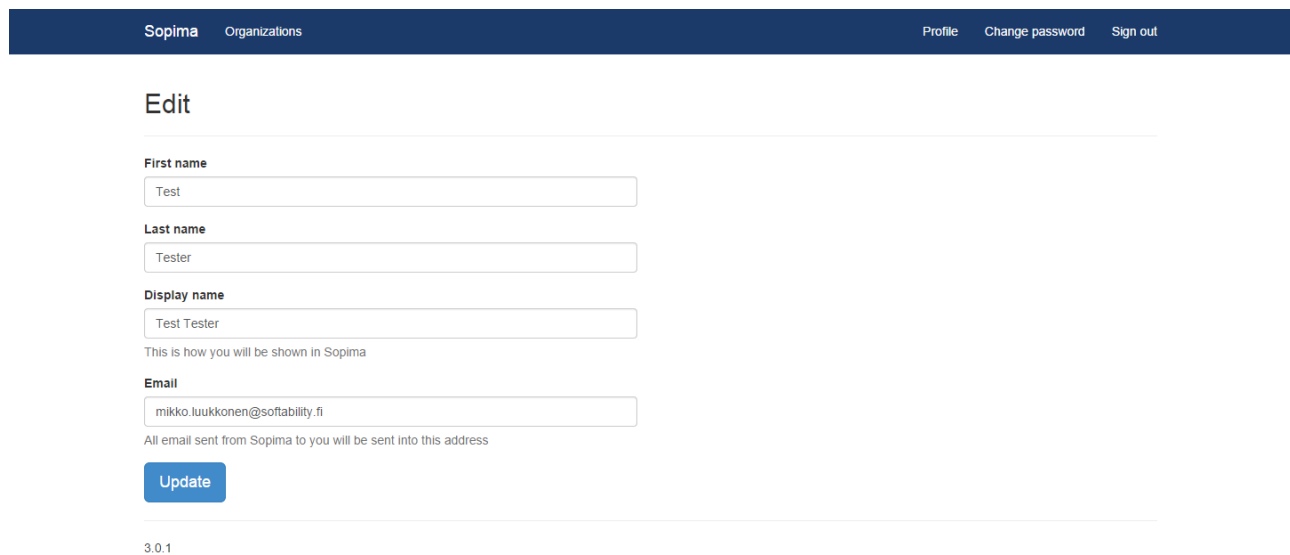


Picture 26. Identity website – Profile.

You can change first name, last name, display name and your email address.

You cannot change your identity because it is your unique login name for Sopima.

Click the “Update” button.



Picture 27. Identity website – Edit Profile.

Click the “Change password” menu item at the top.

The page will inform you that you cannot change your password without contacting customer service at servicedesk(a)softability.fi.



Picture 28. Identity website – Change password.

2 Sopima website

2.1 User Groups

-Create Group

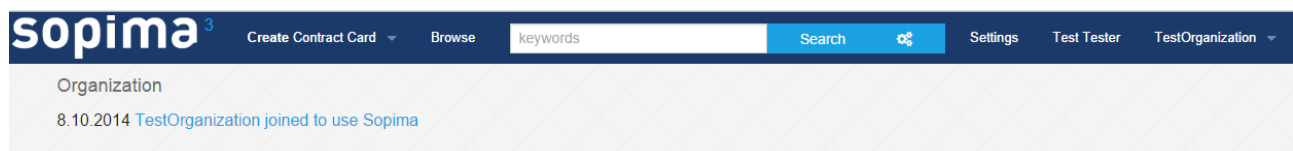
-Edit members

-Edit permissions

-Delete Group

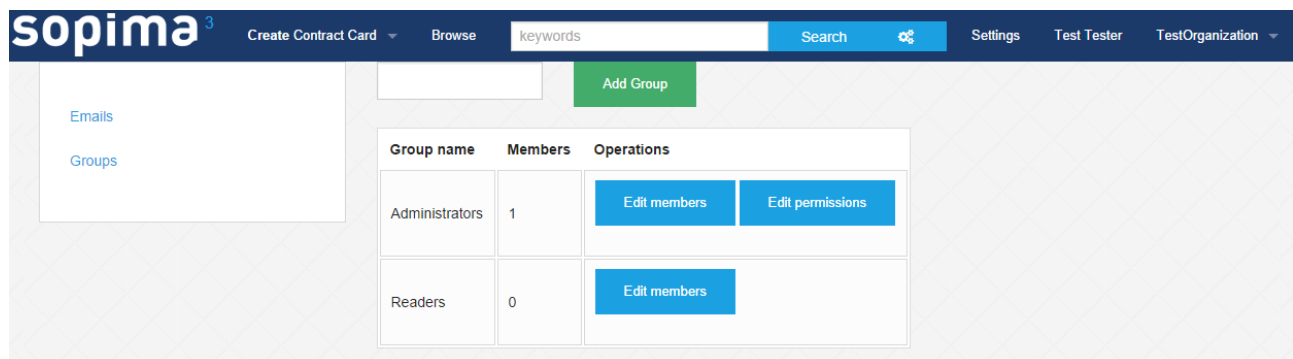
2.1.1 Create a new Group and add Members to it

Select Settings from the front page.



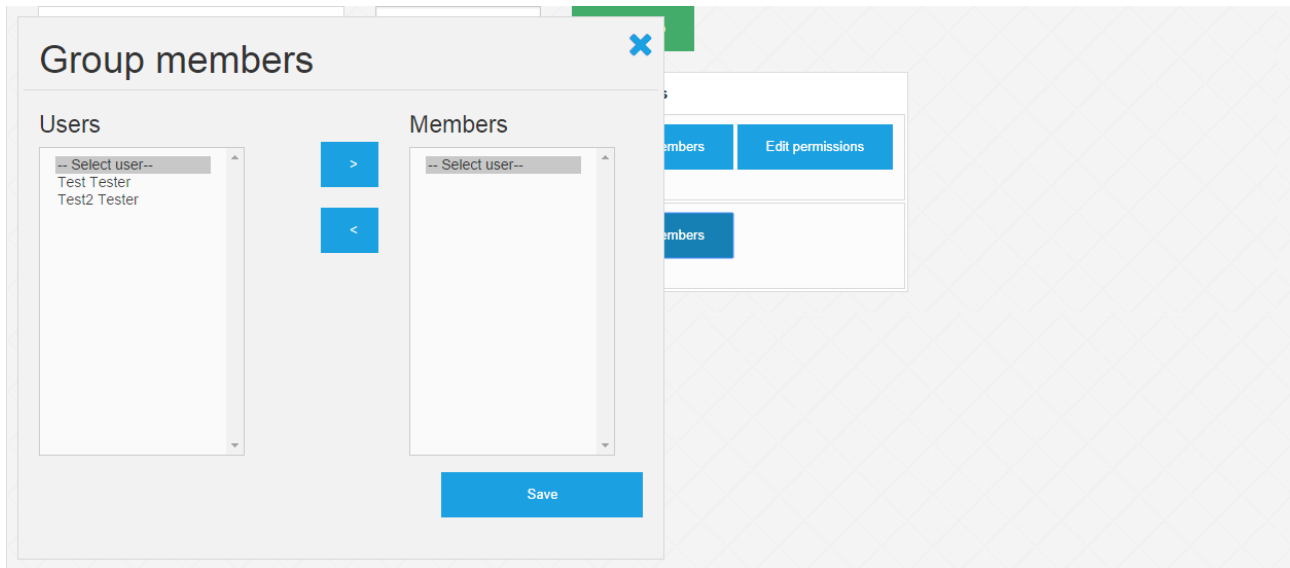
Picture 29. Sopima website – Front page.

Click on the “Edit members” button for the Readers Group.



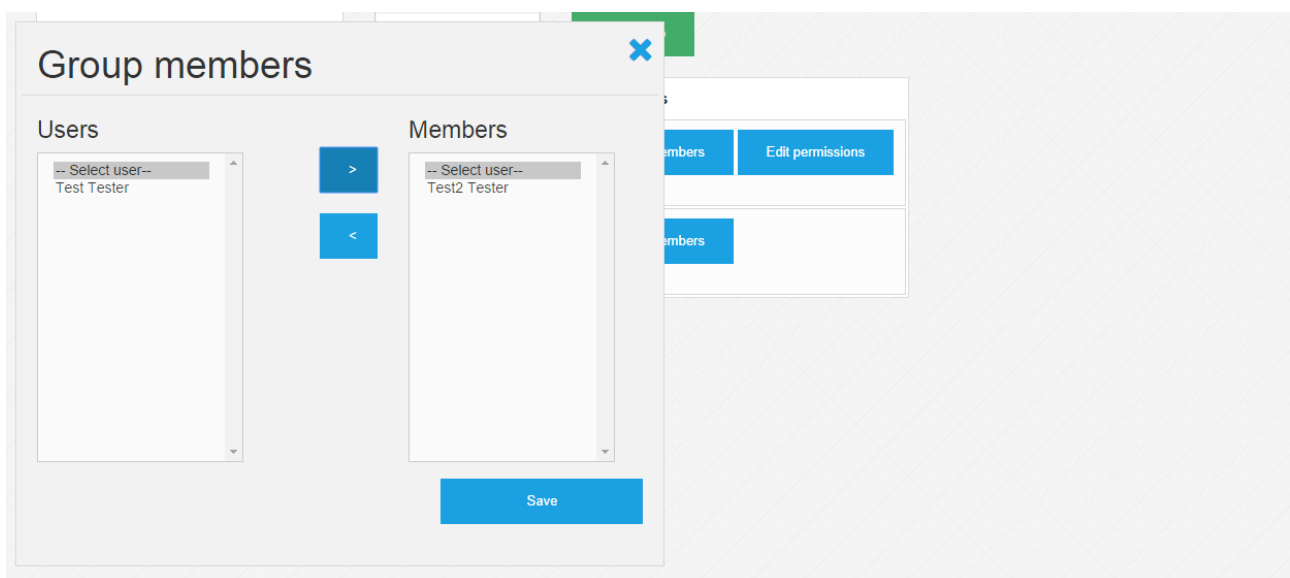
Picture 30. Sopima website – Settings\Groups – Before editing Group members.

On the left you see the users you can add to this Group. On the right you see the current members of this Group.



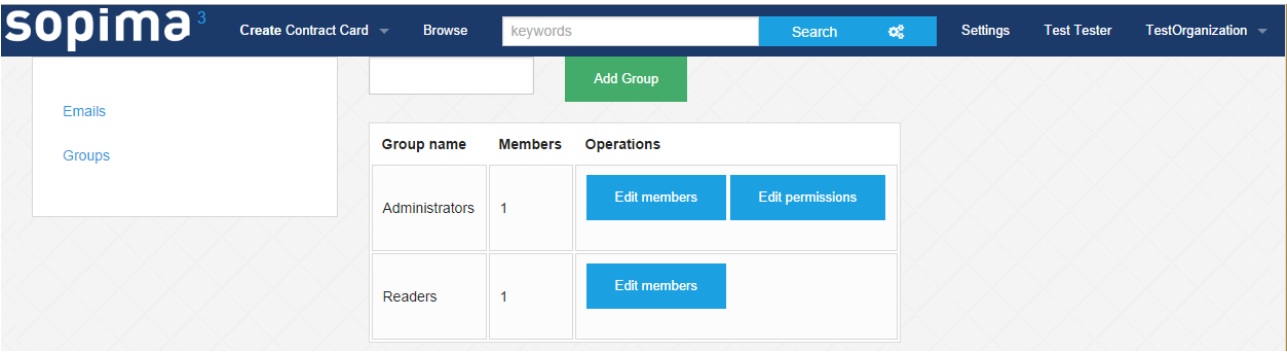
Picture 31. Sopima website – Settings\Groups – Add Users to Group members.

Add Test2 Tester to the Group and click Save.



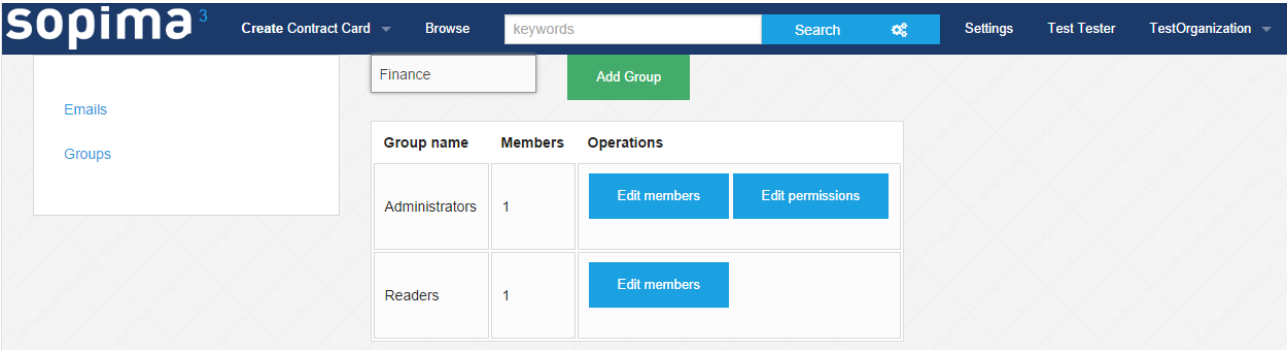
Picture 32. Sopima website – Settings\Groups – Added Users to Group members.

You can now see that there is one (1) member in the Readers Group.



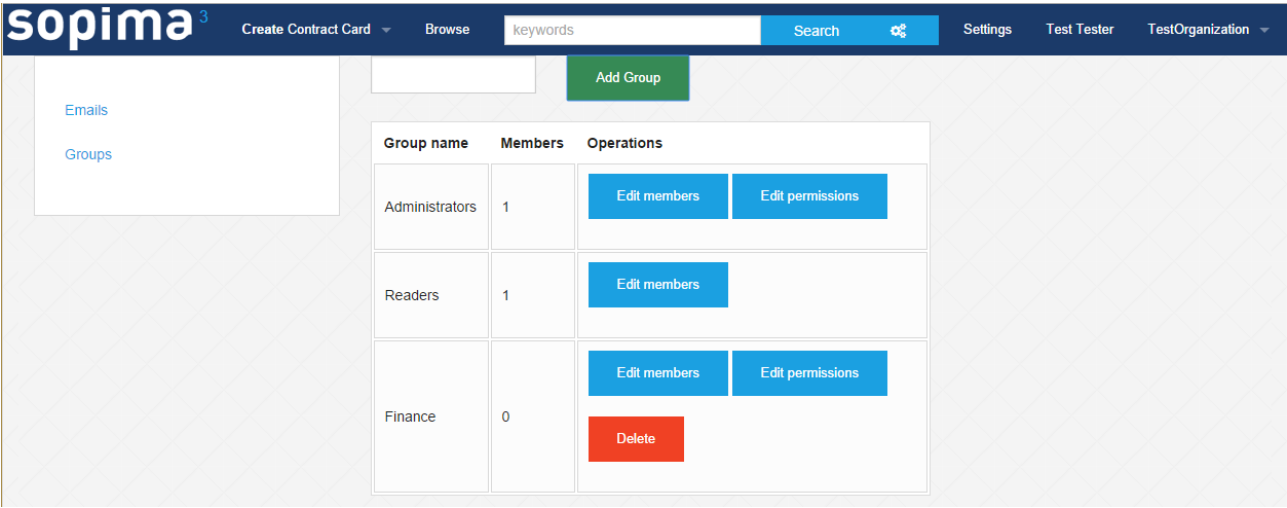
Picture 33. Sopima website – Settings\Groups – After editing Group members.

Create a new Group by typing the name in the text box and clicking “Add Group” button. We will create a Finance Group.



Picture 34. Sopima website – Settings\Groups – Before adding new Group.

The page updates to show you the newly created Group, called “Finance” in this case. It has zero (0) members at this point.



Picture 35. Sopima website – Settings\Groups – After adding new Group.

2.1.2 Edit Group permissions

You can set the following permissions on a Group.

Resource Cards

Create resource	System.Resources.All	
Delete resource	System.Resources.All	
Edit resource	System.Resources.All	
View resource list in contract editor	-	User can see the list of resources created from resource type if the contract contains a resource or resource list component where the selected resource type is selected as the type

Resource Card templates

Create resource type	System.ResourceTypes.All
Edit resource type	System.ResourceTypes.All
Delete resource type	System.ResourceTypes.All

Contract Card templates

Create template	System.Templates.All
Delete template	System.Templates.All
Edit template	System.Templates.All

Contract Cards

Design contract card	System.Contracts.All	
Fill contract card	System.Contracts.Edit or	System.Contracts.All
View contract card	-	If user can see the contents of one folder into which contract is tagged, then he can view the contract
Delete contract card	System.Contracts.All or System.Contracts.Edit	

Create contract card from template	-	If user can see the template package in which the template is she can create contract card from the template
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Groups

Add group	System.Settings.All
Delete group	System.Settings.All
Edit members	System.Settings.All
Edit permissions	System.Settings.All

Email Templates

View	System.Settings.All
Edit	System.Settings.All

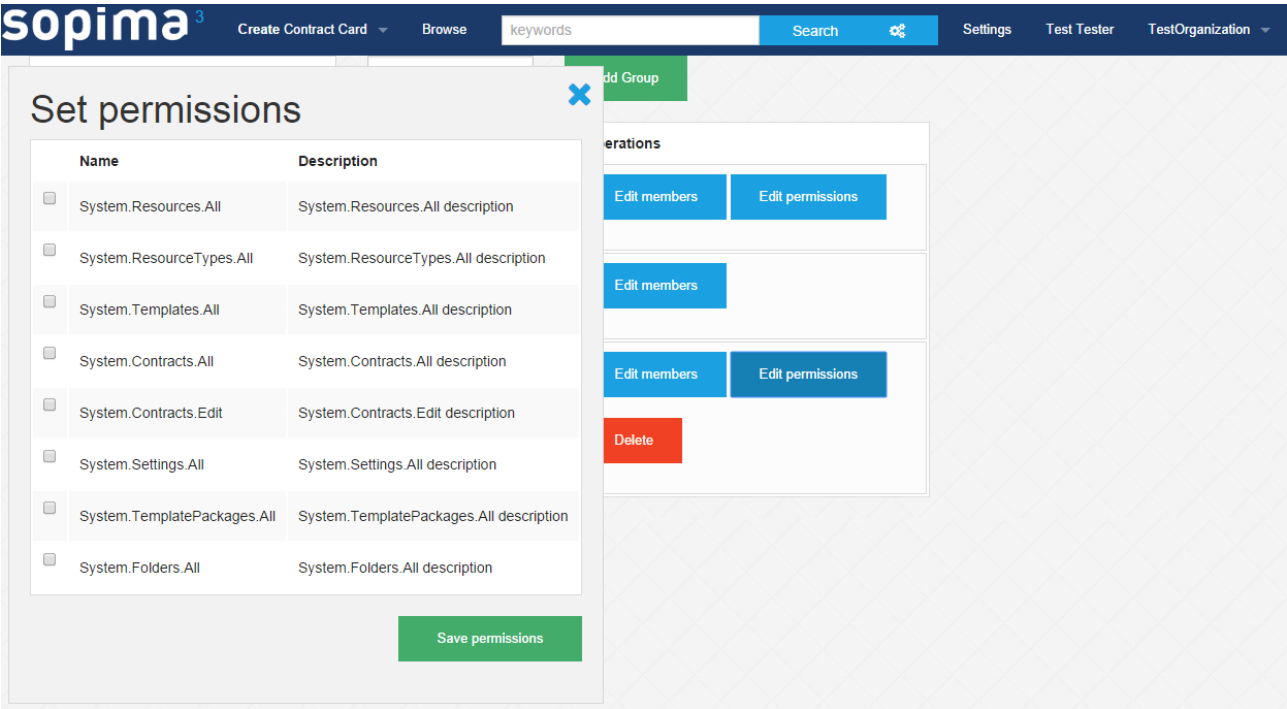
Folders

Edit	System.Folders.All
Delete	System.Folders.All

Packages

Edit	System.TemplatePackages.All
Delete	System.TemplatePackages.All

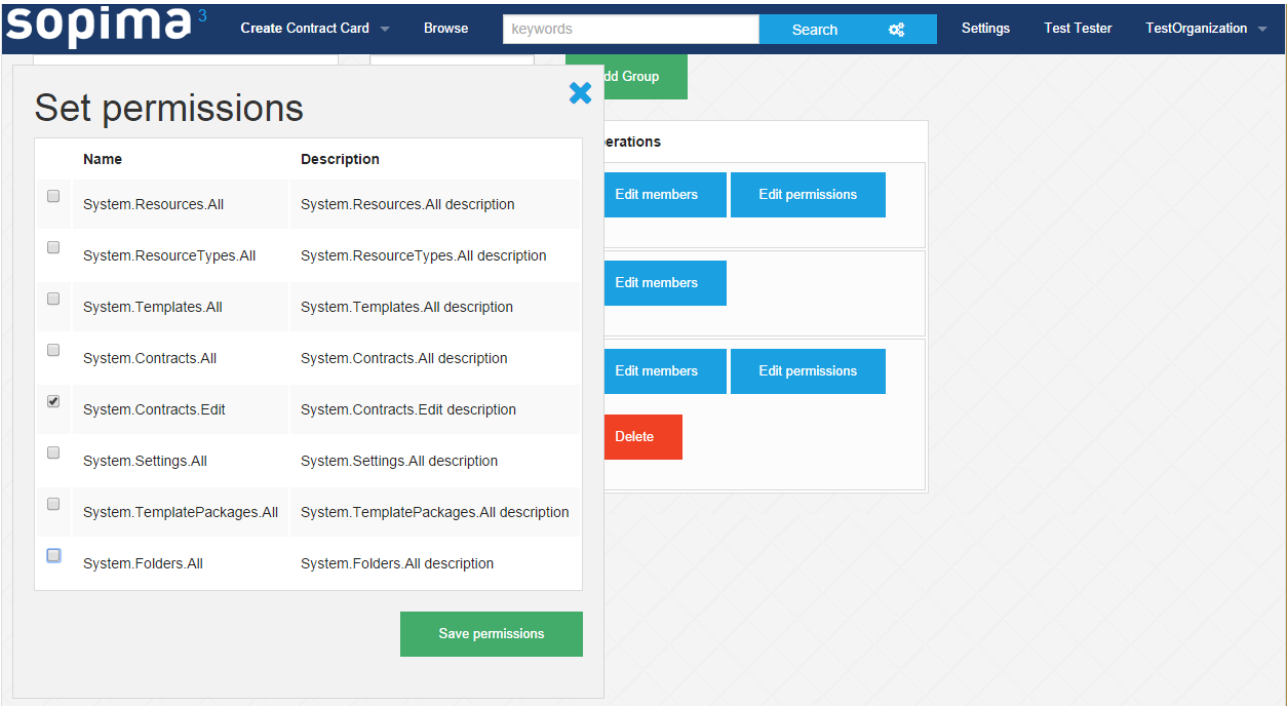
Click “Edit permissions” on the Finance Group.



Picture 36. Sopima website – Settings\Groups – Before setting permissions on a Group.

Set the “System.Contracts.Edit” permission for the Finance Group. This means that the Finance Group can modify and delete a Contract Card.

Save permissions.



Picture 37. Sopima website – Settings\Groups – After setting permissions on a Group.

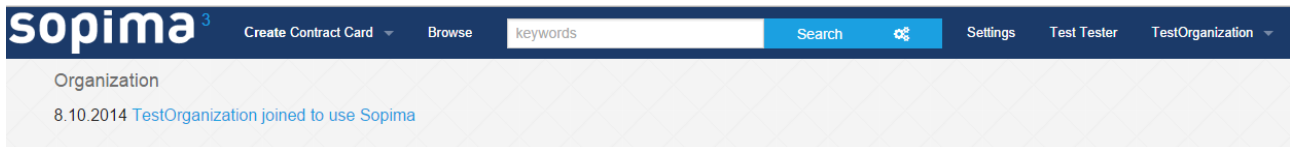
2.2 Folders

-Create Folders

-Give Groups permission to Folders

-Delete Folders

Start by clicking on the “Browse” button at the top.



Picture 39. Sopima website – Front page.

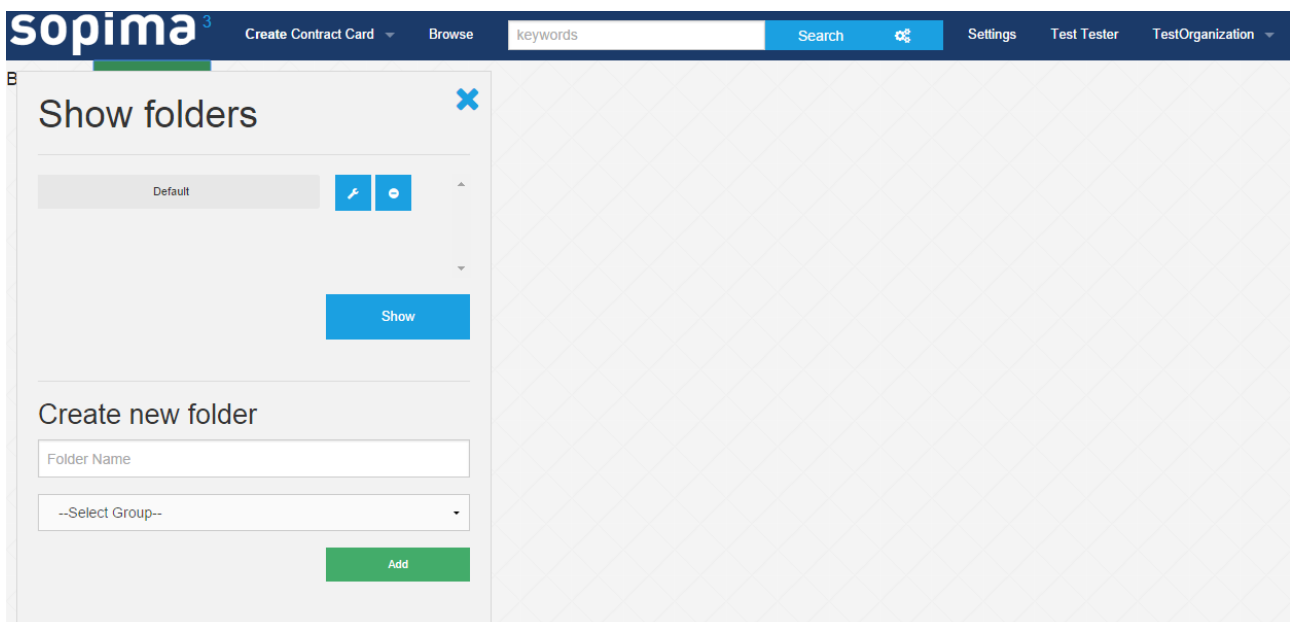
You are shown the currently selected Folders.

Click the “Choose folders” button.



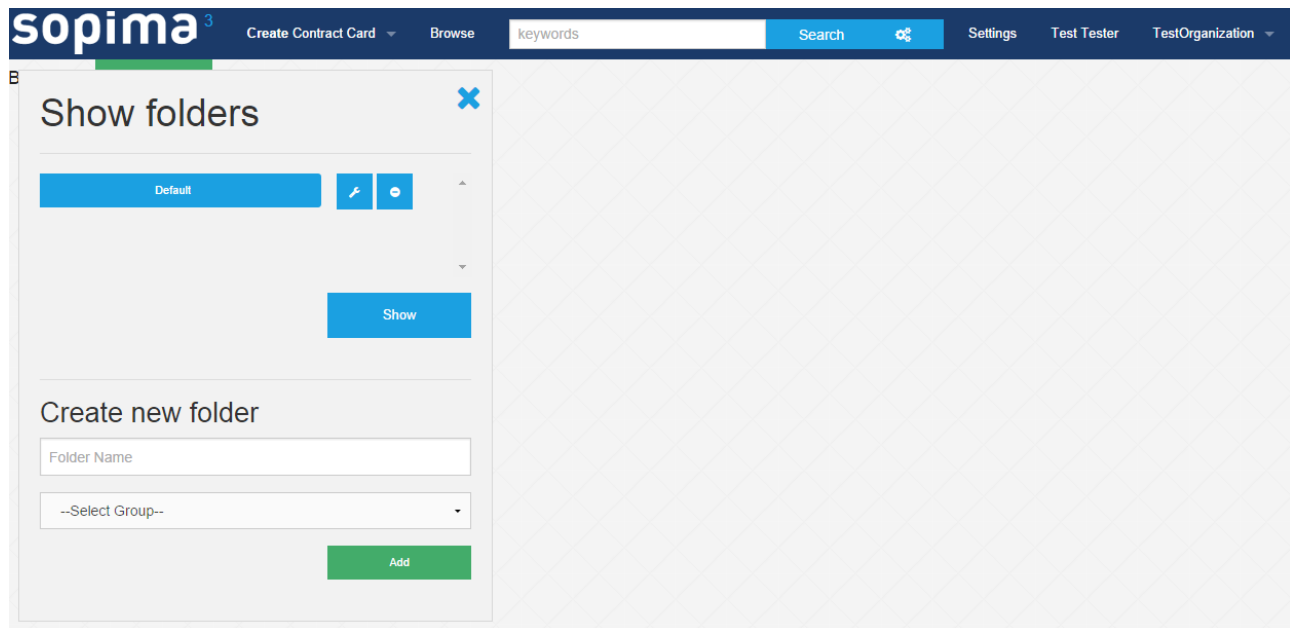
Picture 40. Sopima website – Browse.

There is only the Default Folder in the list of Folders.



Picture 41. Sopima website – Browse – Choose folders.

Click on the “Default” Folder to select it. It will turn blue when it is selected.

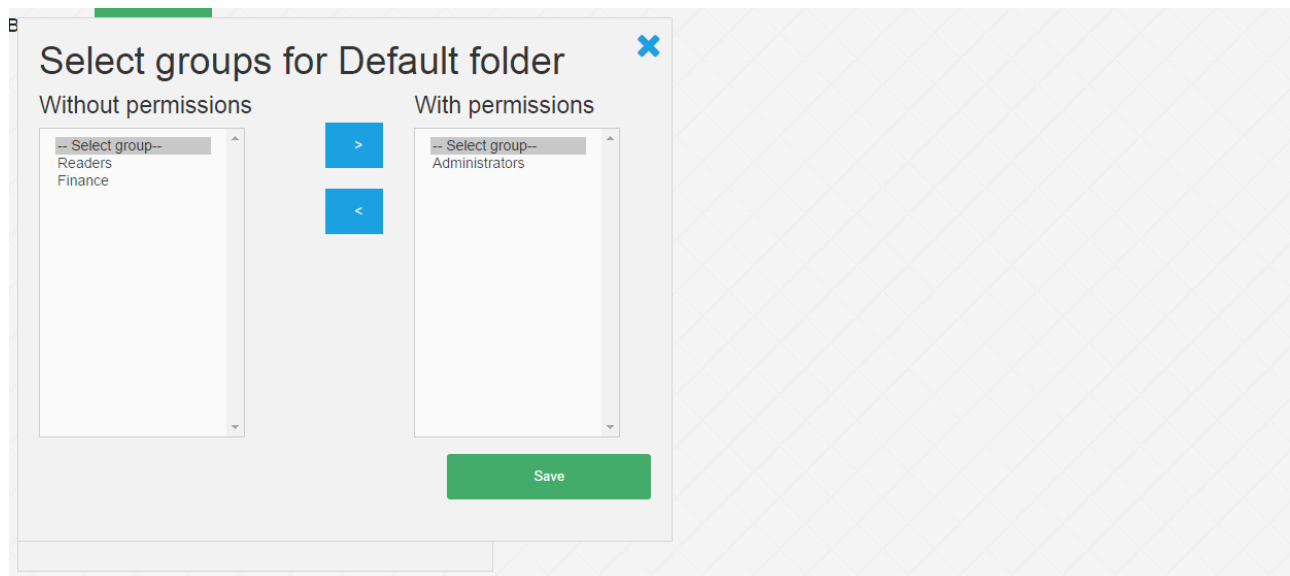


Picture 42. Sopima website – Browse – Choose folders – Default folder selected.

Now click on the blue wrench button next to the Folder name to set access rights for Groups.

Groups without permissions to the selected Folder are located on the left. Groups with permissions to the selected Folder are located on the right.

If you change permissions then remember to Save.

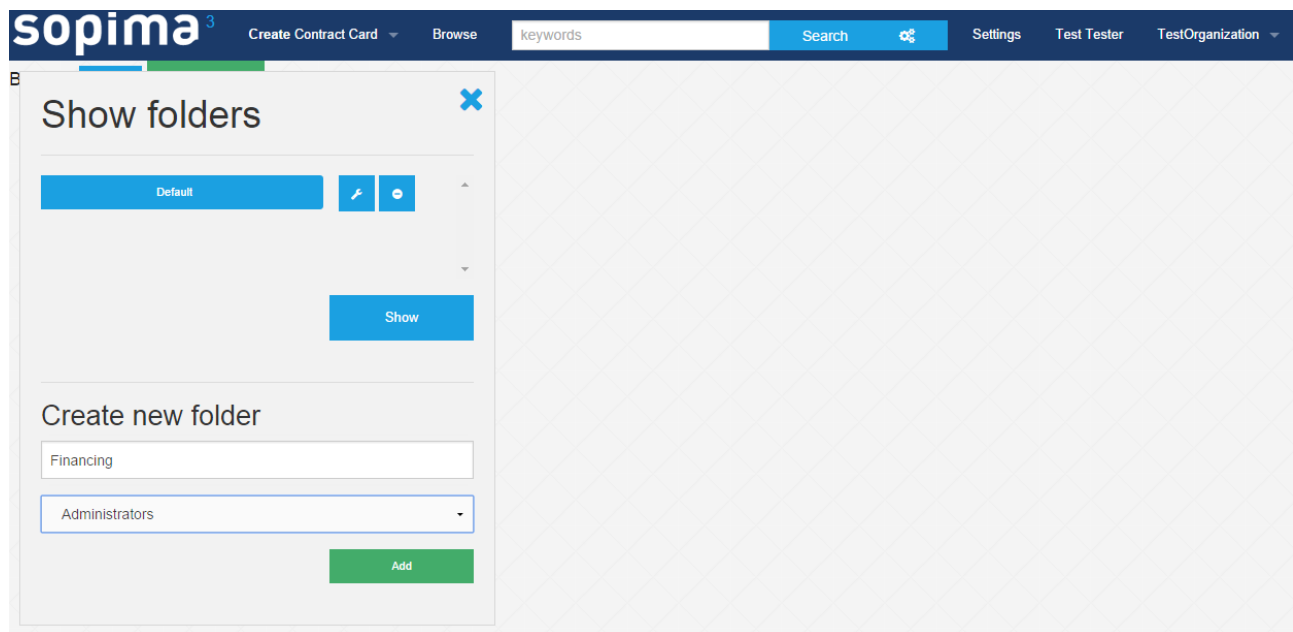


Picture 43. Sopima website – Browse – Choose folders – Select groups for Default folder.

Create a new Folder by typing its name and select the first Group that has permissions to this new Folder.

In our example we create a “Financing” Folder and set permissions for the Administrators Group to it.

Press the “Add” button.



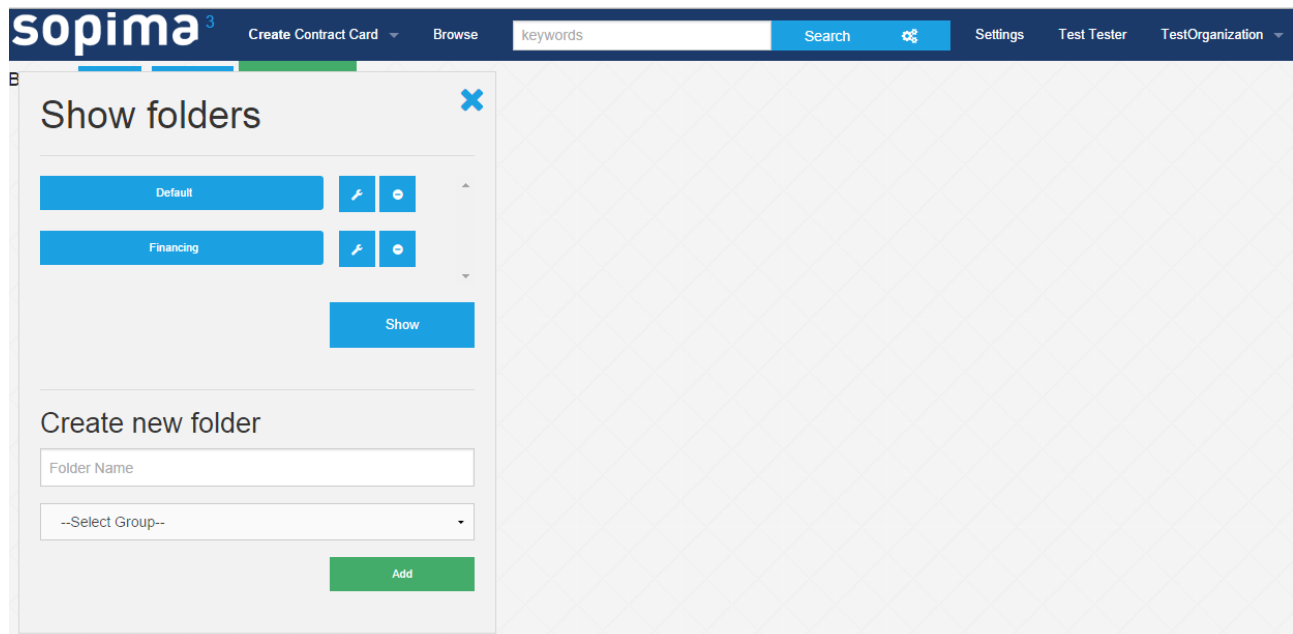
Picture 44. Sopima website – Browse – Choose folders – Create new folder.

Remember you can delete a Folder by clicking on the blue circle button next to the Folder name.

The newly created Folder is show now in the Folder list above.

Select both “Default” and “Financing” Folders.

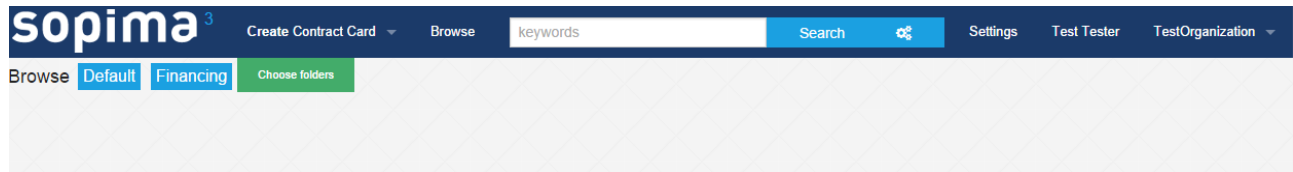
Press the “Show” button.



Picture 45. Sopima website – Browse – Choose folders – After new folder has been created and selected.

No you can browse with the two selected Folders “Default” and “Financing”.

There are no Contract Cards visible yet because they have not been created yet in this demo.



Picture 46. Sopima website – Browse with two folders.

2.3 Resource Card templates and Resource Cards

-Create Resource Card template

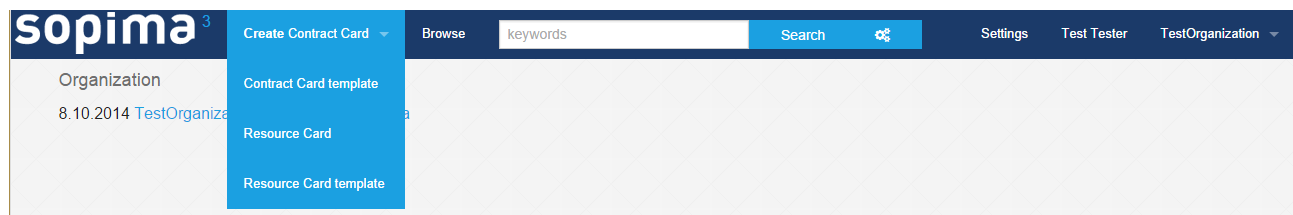
-Modify or Delete an existing Resource Card template

-Create Resource Cards from a template

-View existing Resource Cards based on a template

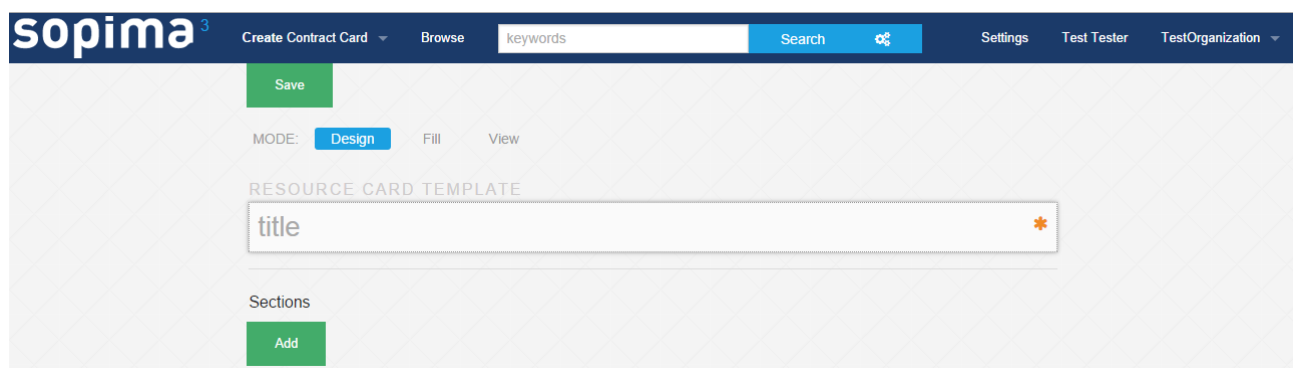
-Modify or Delete an existing Resource Card

Start by choosing from the Create menu the option “Resource Card template”.



Picture 47. Sopima website – the Create menu. Choose Resource Card template.

You are shown an empty Resource Card template for you to design and fill.



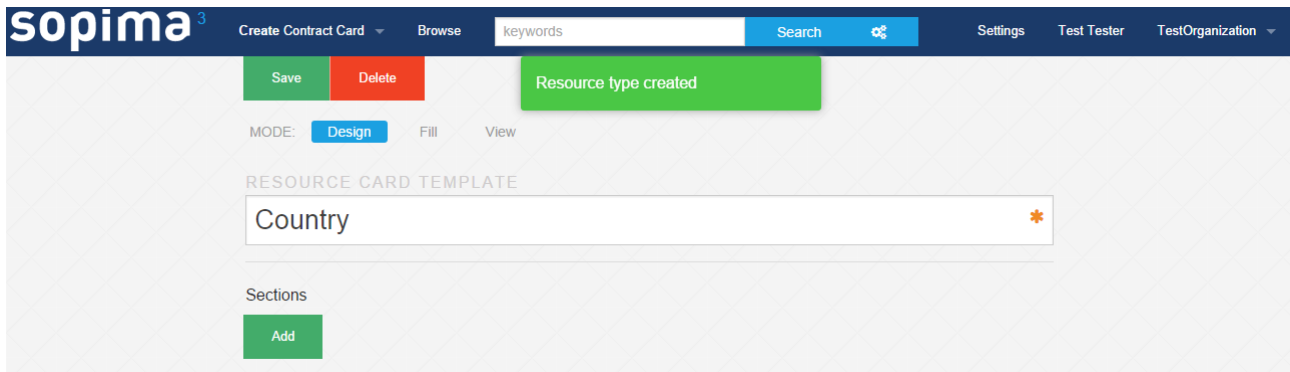
Picture 48. Sopima website – Before a new Resource Card template is created.

We can use this Resource Card template without any designing, thus with only the title element. Thus no metadata fields required at this time.

If you wanted to add new metadata fields to the Resource Card template then you would have to continue designing it before filling it with data.

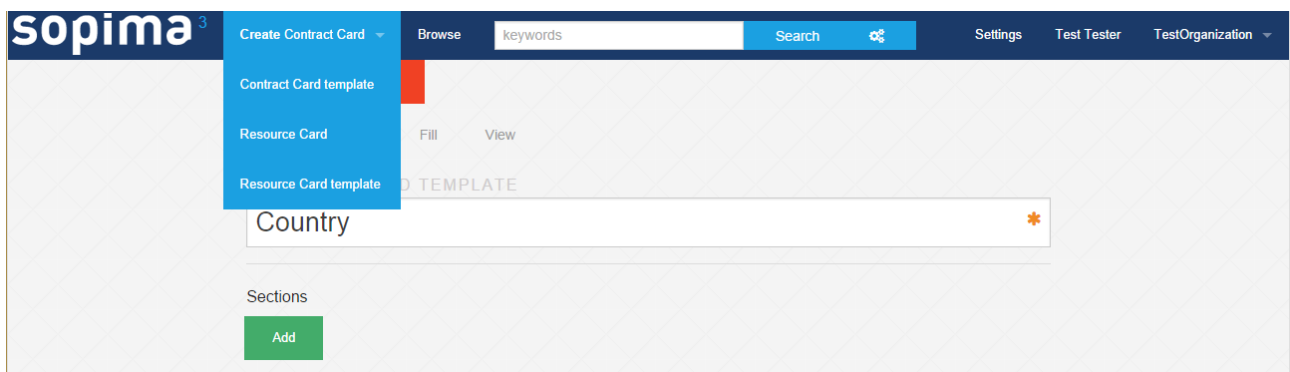
Fill in the title, for example “Country”.

Press the “Save” button at the top.



Picture 49. Sopima website – After a new Resource Card template is created.

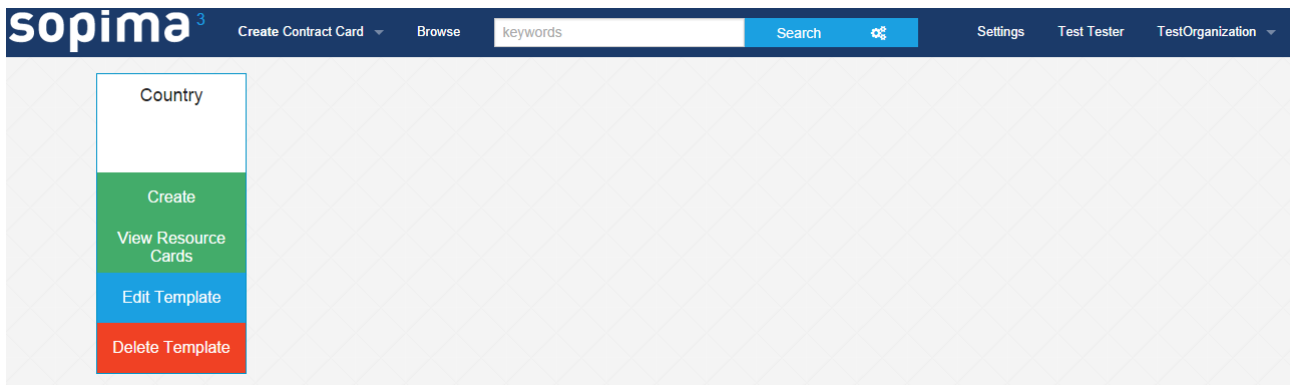
From the Create menu choose “Resource Card”.



Picture 50. Sopima website – the Create menu. Choose Resource Card.

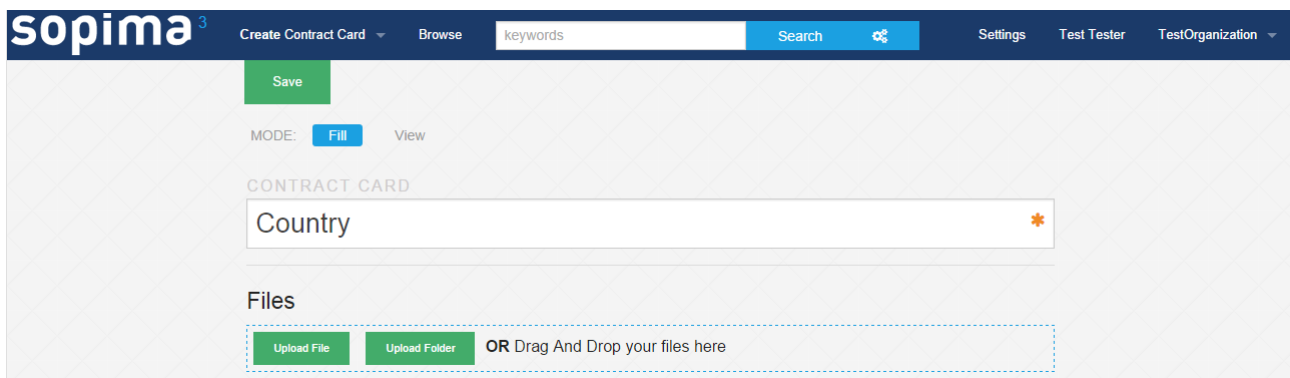
You are presented all the different Resource Card templates in the organization. In this demo there is only the one you just created.

Choose “Create” from the Resource Card template called “Country”.



Picture 51. Sopima website – Create Resource Card, view Resource Cards and edit or delete Resource Card template.

You are shown a Resource Card with the default values from the template.



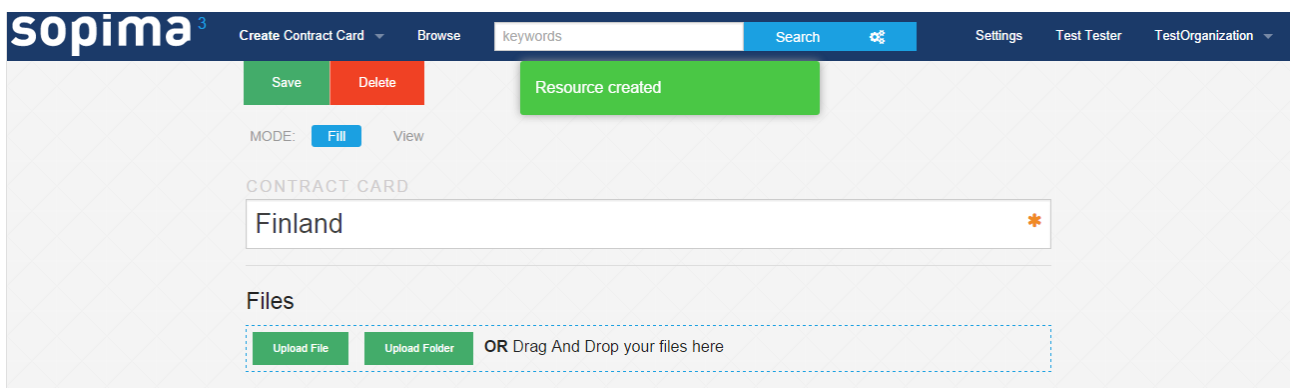
Picture 52. Sopima website – Before a new Resource Card is created.

Fill in the title and possible other metadata fields.

In this example we just typed the title “Finland”.

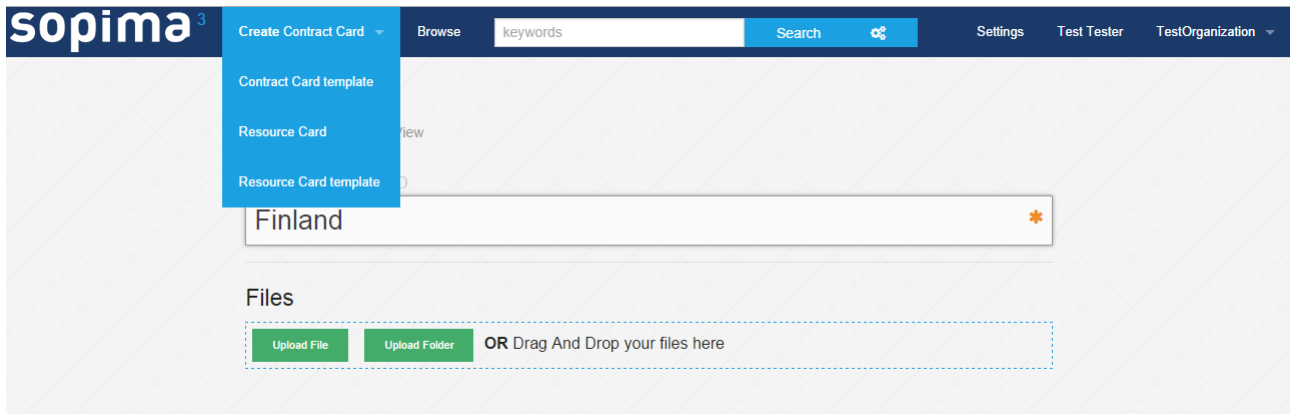
You can also add attachments to the Resource Card. For example in our demo it could be information on the country “Finland” like business environment, office locations or anything else related to the country.

Press the “Save” button at the top.



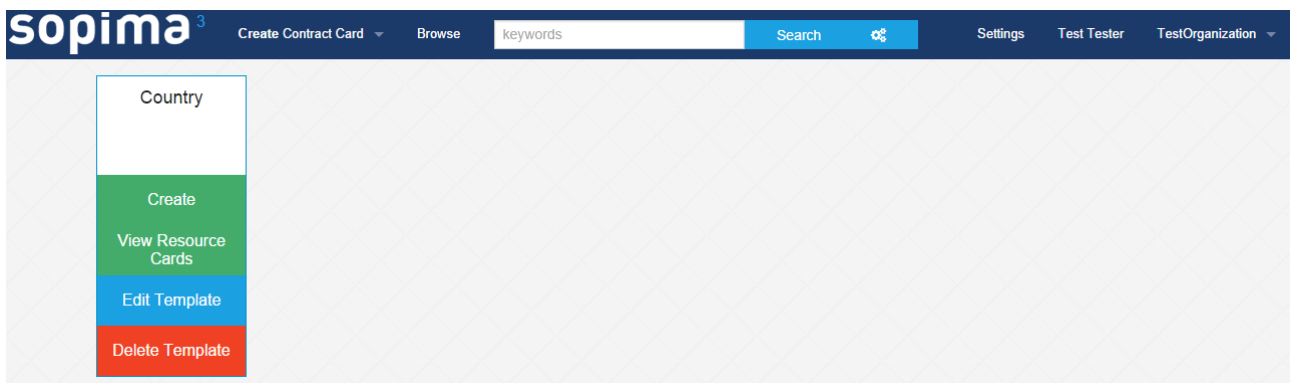
Picture 53. Sopima website – After e a new Resource Card is created.

From the Create menu choose “Resource Card”.



Picture 54. Sopima website – the Create menu.

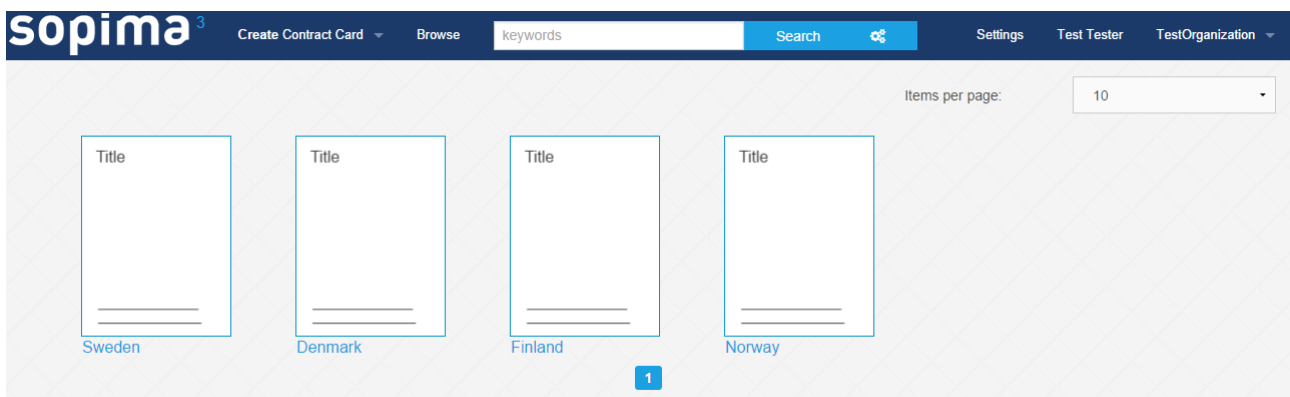
Choose View Resource Cards.



Picture 55. Sopima website – Create Resource Card, view Resource Cards and edit or delete Resource Card template.

You can view all the Resource Cards made out of the chosen template.

Now choose the Resource Card called “Denmark”.



Picture 56. Sopima website – View Resource Cards belonging to a template.

“View” mode is selected by default.

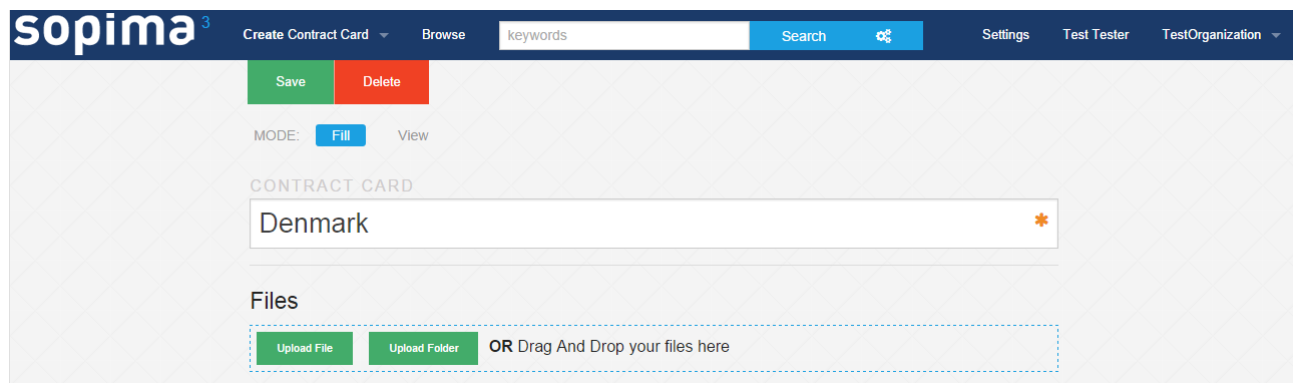
Choose “Fill” mode from the top.

Now you can edit the Resource Card.

You can also add attachments to the Resource Card. For example in our demo it could be information on the country “Denmark” like business environment, office locations or anything else related to the country.

Press the “Save” button at the top.

You can also delete the Resource Card.



Picture 57. Sopima website –Modify or Delete an existing Resource Card.

2.4 Packages for Contract Card templates

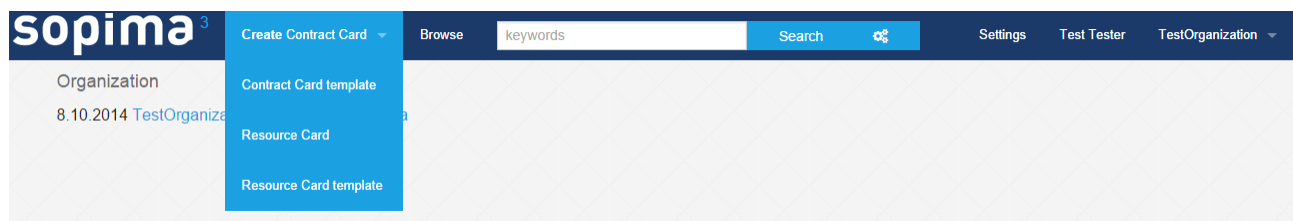
-Create Packages

-Set access rights for Groups

-Edit Package name and description

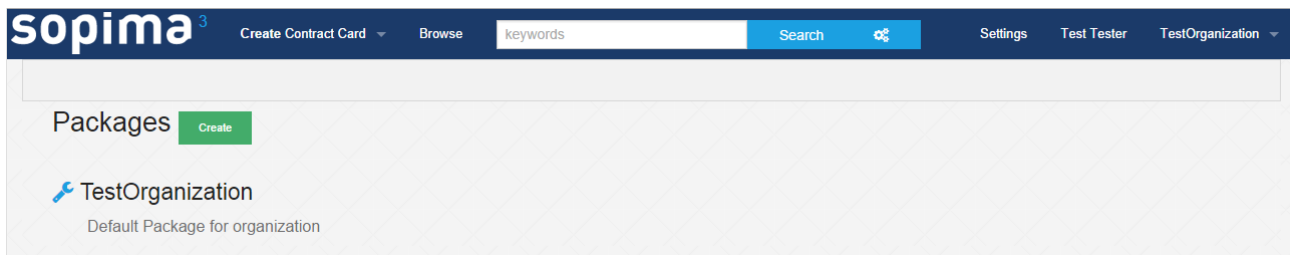
-Delete Packages

Start by choosing the “Create Contract Card” option from the Create menu.



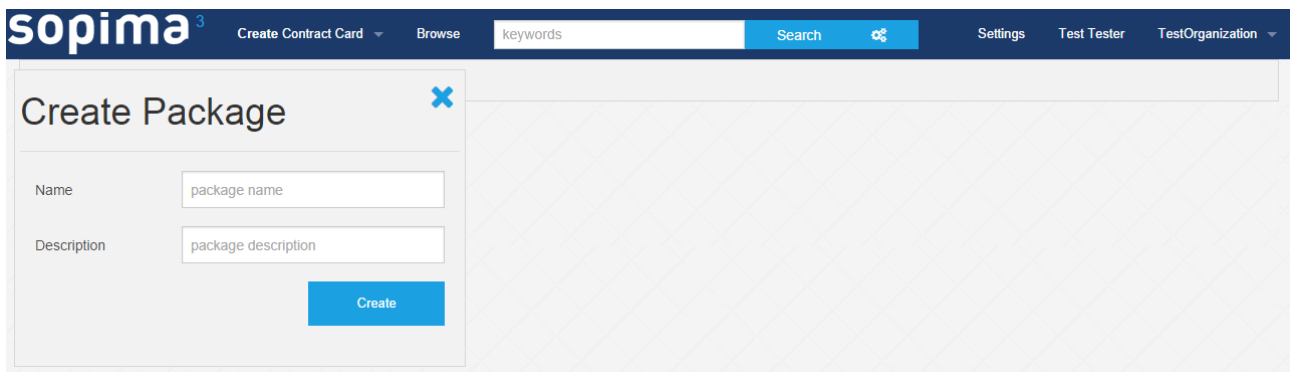
Picture 58. Sopima website – the Create menu.

You will see the default package which has the same name as the organization which is TestOrganization in our demo.



Picture 59. Sopima website – Default Package visible.

Click the “Create” button to create a new Package.

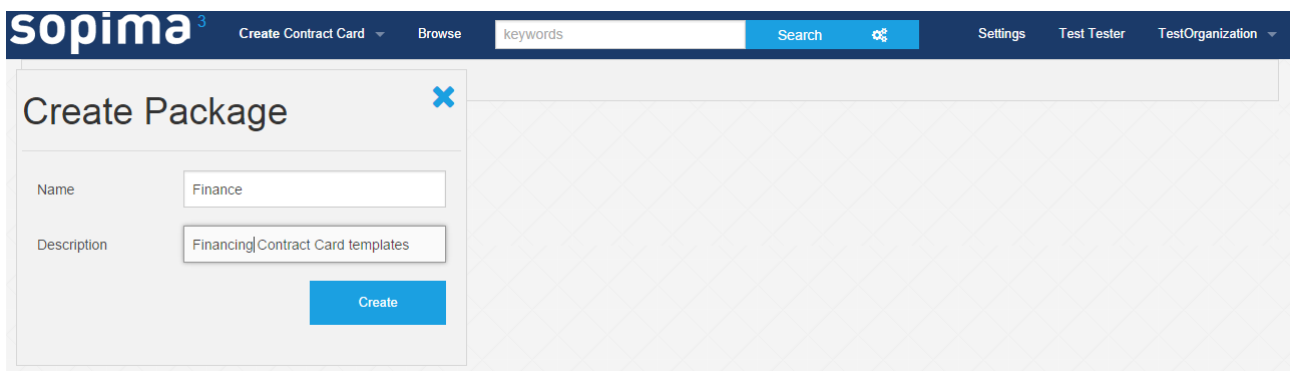


Picture 60. Sopima website – Before creating a Package.

Fill in the name and description of the new Package.

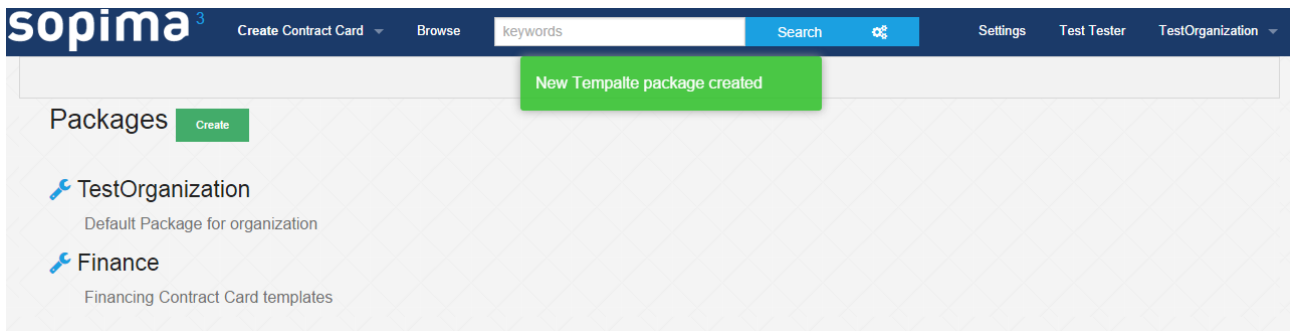
In our example the name is “Finance” and the description is “Financing Contract Card templates”.

Click the “Create” button.



Picture 61. Sopima website – After creating a Package.

Now you will see the new Package appear on the page.



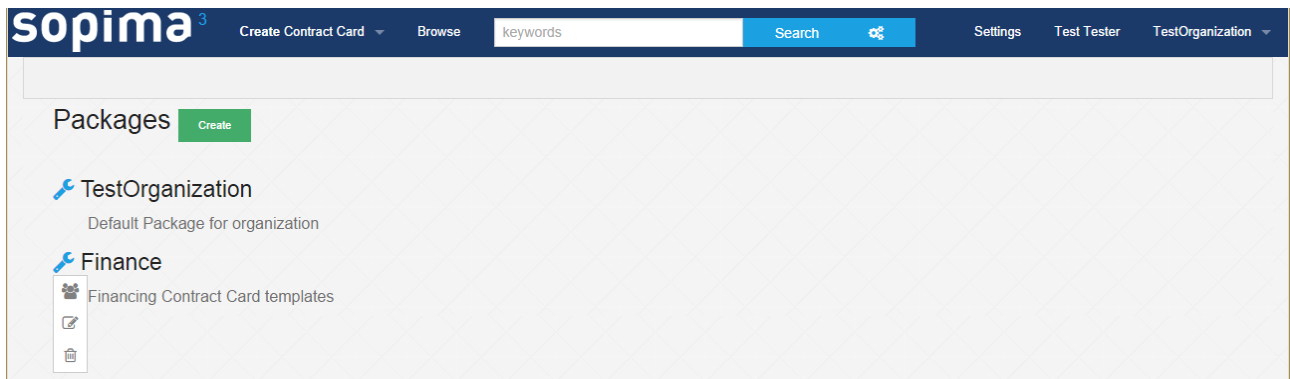
Picture 62. Sopima website – Default and new Package visible.

If you click the blue wrench icon next to a package name you will see a little menu that has options for:

-Top: Setting rights for Groups to see the Package

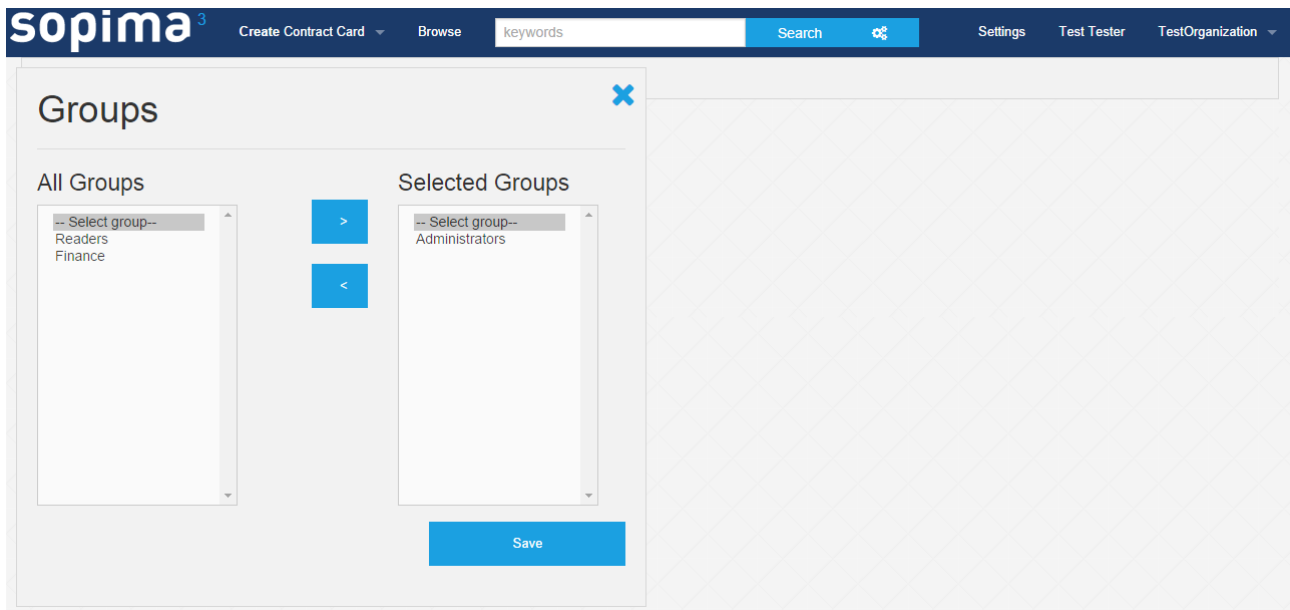
-Middle: Edit the Package name and description

-Bottom: Delete the Package.



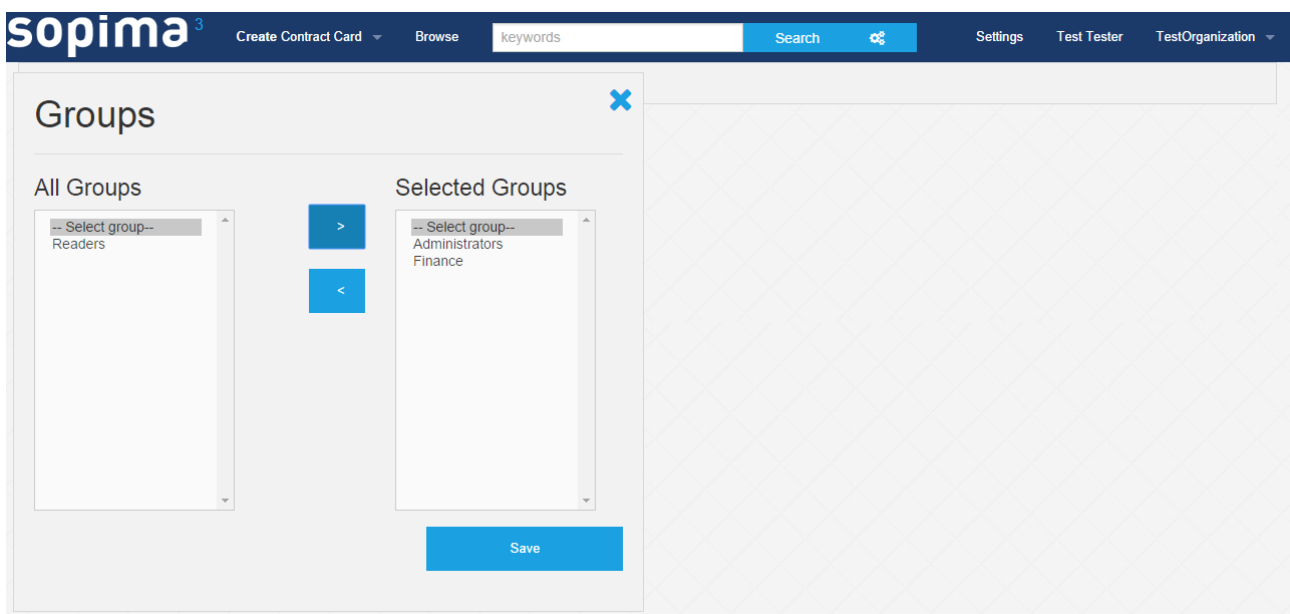
Picture 63. Sopima website – Edit menu for a Package.

Choose the top most icon to edit Group rights for the Package.



Picture 64. Sopima website – Before setting rights for Groups to the Package.

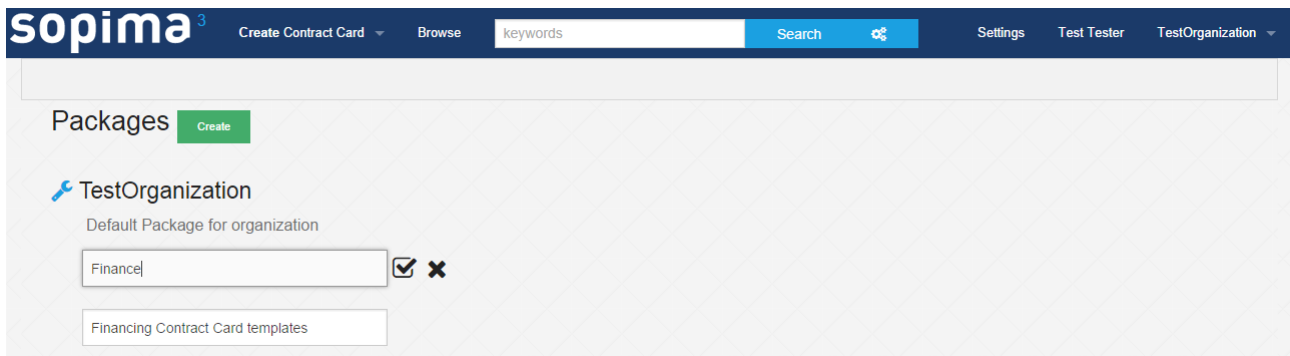
Move Groups from the left to the right to give them rights to the Package. This means that users of the Group can see this Package when they want to create a new Contract Cards.



Picture 65. Sopima website – After setting rights for Groups to the Package.

Press the “Save” button.

Choose the middle icon in the Package edit menu to modify the name and description of the Package.



Picture 66. Sopima website – Edit the name and description of a Package.

2.5 Contract Card templates

-Create Contract Card templates

-Add sections

-Set heading

-Choose field types: text, date, currency, resource, number, boolean and their respective lists

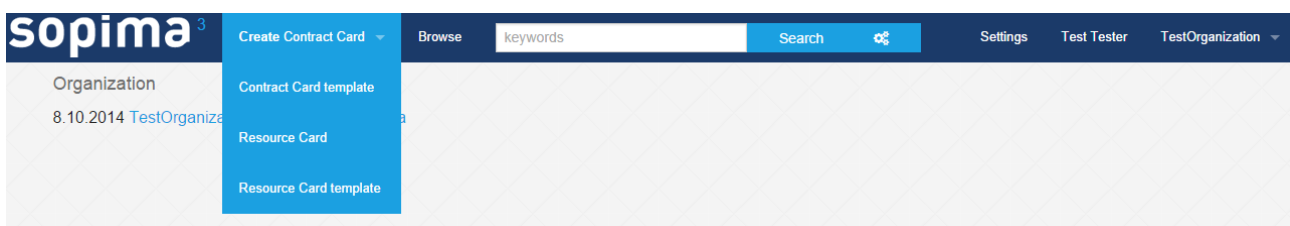
-Set field as required and/or locked

-Set notifications on values and dates

-Change section order by dragging with the mouse

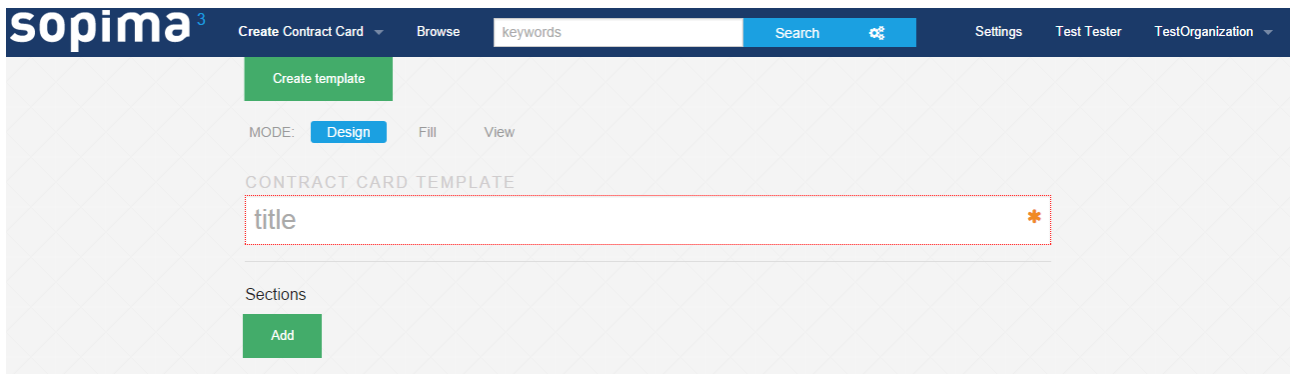
-Choose whether to update existing Contract Cards based on the template being modified

Start by choosing the “Contract Card template” option from the Create menu.



Picture 67. Sopima website – the Create menu.

You are presented with a Contract Card template in design mode with an empty title and no metadata fields yet.



Picture 68. Sopima website – Create new Contract Card template.

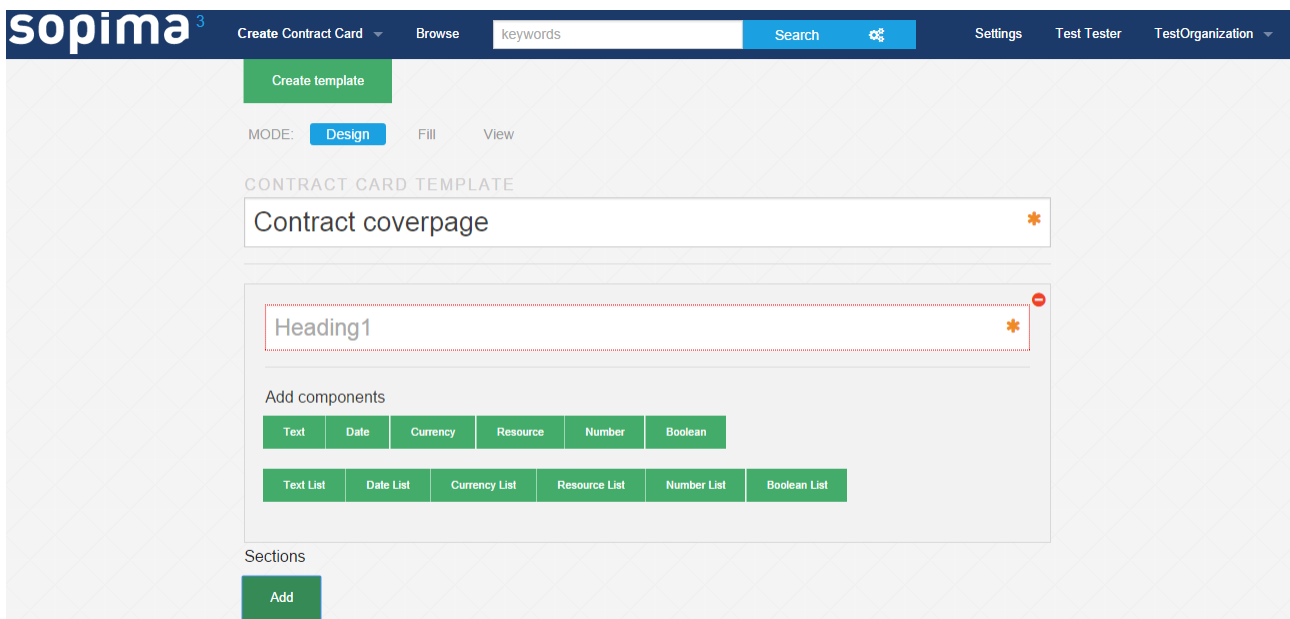
Type in the title of the Contract Card template. In our demo it is called “Contract coverage”.

Add a new section by clicking on the “Add” button from the bottom of the page.

Sections have a header and one or many components which represent the metadata fields on the Contract Card created from this template.

Components can be of the following types: text, date, currency, resource, number or Boolean.

All components mentioned above have their respective list component as well.



Picture 69. Sopima website – Add title and first Section.

Type in the header of the first section. In our demo it is called “Contracting partner”.

Choose component type “Text”.

Click on the “Required” tag to set the metadata field as mandatory.

The “Locked” tag means that the metadata field cannot be edited and contains some data that must always be visible on new Contract Cards.

The screenshot displays the Sopima web application interface for creating a contract card template. At the top, the navigation bar includes the Sopima logo, a 'Create Contract Card' dropdown, a 'Browse' button, a search bar with the placeholder 'keywords', and links for 'Settings', 'Test Tester', and 'TestOrganization'. The main content area is titled 'CONTRACT CARD TEMPLATE' and features a 'Create template' button. Below this, the 'MODE' is set to 'Design'. The first section is 'Contract coveragepage'. The second section is 'Contracting partner', which contains a text input field. Below the input field, there are checkboxes for 'Required' (checked) and 'Locked' (unchecked). The 'Add components' section provides a grid of component types: Text, Date, Currency, Resource, Number, Boolean, Text List, Date List, Currency List, Resource List, Number List, and Boolean List. At the bottom, the 'Sections' section has an 'Add' button.

Picture 70. Sopima website – Fill Section title and choose component type.

Add another section by clicking on the “Add” button from the bottom of the page.

In our demo we have created a section called “Contract value” which contains one currency type component. It has a default value of 0.00 and a currency of EUR.

On the currency type you can set the minimum value for an automated notification to be sent to the chosen Groups (and their users). You have to click on the “Notification” tag and set the minimum value for this to work.

The screenshot displays the 'Add Currency type' interface in the Sopima application. It features two primary configuration panels. The top panel, labeled 'text', includes a text input field, checkboxes for 'Required' (checked) and 'Locked', and a grid of component buttons: Text, Date, Currency, Resource, Number, Boolean, and their respective list versions. The bottom panel, labeled 'currency', contains a 'Contract value' field with a star icon, a 'Year value' input, a currency dropdown menu currently showing 'eur', and checkboxes for 'Required', 'Locked', and 'NOTIFICATION'. It also includes the same grid of component buttons. Below these panels is a 'Sections' section with an 'Add' button.

Picture 71. Sopima website – Add Currency type.

Add another section by clicking on the “Add” button from the bottom of the page.

In our demo we have created a section called “Contract dates” which contains three date type components: Signing, Termination and Check-up.

In our demo we set the Signing date as required and an automated email alert on the Termination and Check-up dates. For the Termination date the email alert is sent 30 days before the filled in date. For the Check-up date the email alert is sent one day before the filled in date.

We need at least three dates to cover both short-term and evergreen contracts.

All contracts have a signing date. So this needs to be set mandatory in the template.

For short-term contract there is a clearly defined termination date and no check-up date is thus needed. Thus check-up date cannot be set mandatory in the template.

For evergreen contracts you do not a termination date, so it cannot be set mandatory in the template. But you can set a check-up date for evergreen contracts which alerts the proper users one day (or more) ahead of time to check the contents of the evergreen contact. During this check the user can set the value of the check-up date one year ahead again and thus evergreen contracts are also checked next year and so on following this process.

Contract dates

date

Signing click to show datepicker

☒ Required ☐ Locked

☐ NOTIFICATION

date

Termination click to show datepicker

☐ Required ☐ Locked

☒ NOTIFICATION

Days before date

And on each day before. ☐

Groups × Administrators × Finance

date

Check-up click to show datepicker

☐ Required ☐ Locked

☒ NOTIFICATION

Days before date

And on each day before. ☐

Picture 72. Sopima website – Add Date types.

Add another section by clicking on the “Add” button from the bottom of the page.

In our demo we have created a section called “Country” which contains one resource type component. For resource component you need to define the Resource Card template. In our demo we choose the “Country” Resource Card template from the drop-down menu.

Write some description on the template next to the drop-down menu, for example “Choose from list”. This guides the user when she fills in a Contract Card based on this template.

Notice that we set Country as a required field.

And on each day ☐ before.

Groups × Administrators × Finance

Add components

Text	Date	Currency	Resource	Number	Boolean
Text List	Date List	Currency List	Resource List	Number List	Boolean List

Country *

resource

Choose from list Country

☒ Required ☐ Locked

Add components

Text	Date	Currency	Resource	Number	Boolean
Text List	Date List	Currency List	Resource List	Number List	Boolean List

Sections

Add

Picture 73. Sopima website – Add Resource type.

You move sections with the mouse by dragging and dropping. Thus you can easily change the order of sections on a template.

In our demo we move the Country section as the top most element on the template below the title “Contract coveragepage”.

Picture 74. Sopima website – Move Section with the mouse drag&drop.

You can inspect how the Contract Card template looks like when filled by selecting “Fill” mode from the top of the page. “Design” mode is default.

Now you can click on the “Country” drop-down menu and see what options (Resource Cards based on the “Country” template) are presented to the user. In our demo they are Sweden, Denmark, Finland and Norway.

If it is a long list you can type the beginning or middle of the word you are looking for and Sopima will present the found matches for you.

The screenshot shows the Sopima website interface. At the top, there's a navigation bar with the Sopima logo, a 'Create Contract Card' dropdown, a 'Browse' button, a search bar with 'keywords', and links for 'Settings', 'Test Tester', and 'TestOrganization'. Below this, a 'Create template' button is visible. The main area shows a 'CONTRACT CARD TEMPLATE' modal in 'Fill' mode. The modal has a title bar with 'MODE: Design Fill View'. Inside, there's a text input field for 'Contract coveragepage'. Below that is a 'Country' section with a 'Choose from list' dropdown menu. The dropdown is open, showing a list of countries: Sweden, Denmark, Finland, and Norway. At the bottom of the modal is a 'Contract value' section with a 'Year value' input field containing '0.00' and a currency selector set to 'eur'.

Picture 75. Sopima website – Check Contract Card template in “Fill” mode.

Let's save this template by clicking on the “Create template” button at the top of the page.

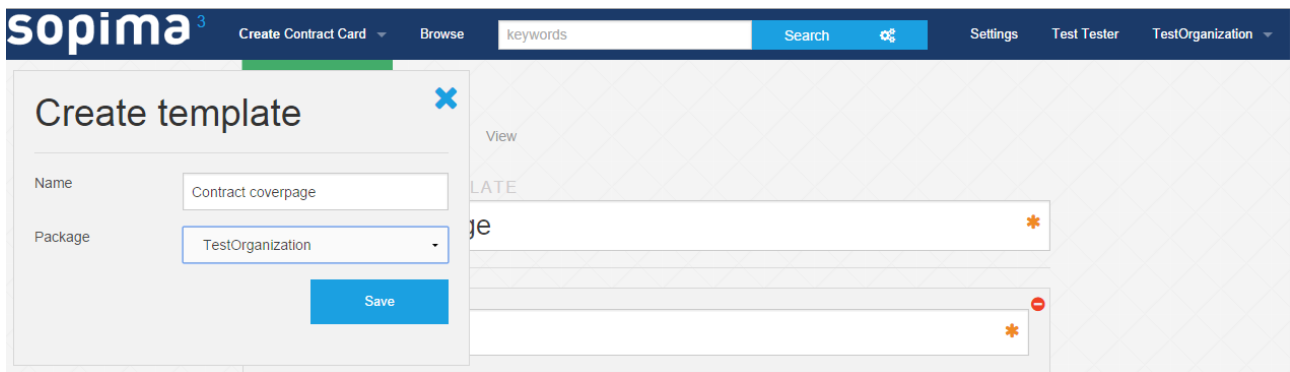
The screenshot shows the Sopima website interface. At the top, there's a navigation bar with the Sopima logo, a 'Create Contract Card' dropdown, a 'Browse' button, a search bar with 'keywords', and links for 'Settings', 'Test Tester', and 'TestOrganization'. Below this, a 'Create template' button is visible. The main area shows a 'Create template' modal. The modal has a title bar with 'Create template' and a close button. Inside, there's a 'Name' input field with 'Contract coveragepage', a 'Package' dropdown menu with '[Select]', and a 'Save' button.

Picture 76. Sopima website – Creating a template.

Fill in the name of the Contract Card template and choose a Package where to store it.

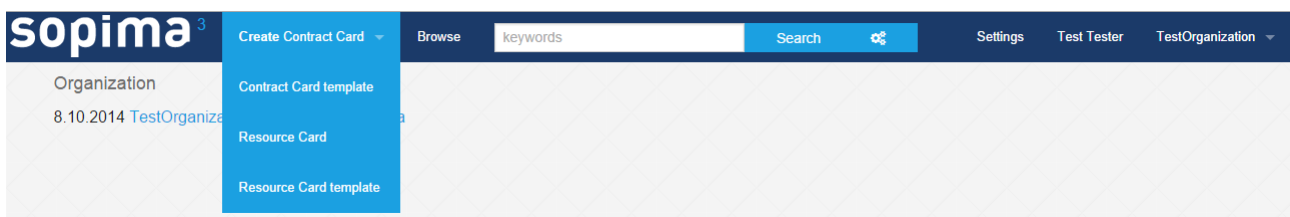
In our demo we name this Contract Card template as “Contract coveragepage” and choose the default package which has the same name as the organization “TestOrganization”.

Press the “Save” button.



Picture 77. Sopima website – Creating a template with package chosen.

Choose the “Contract Card” option from the Create menu at the top.

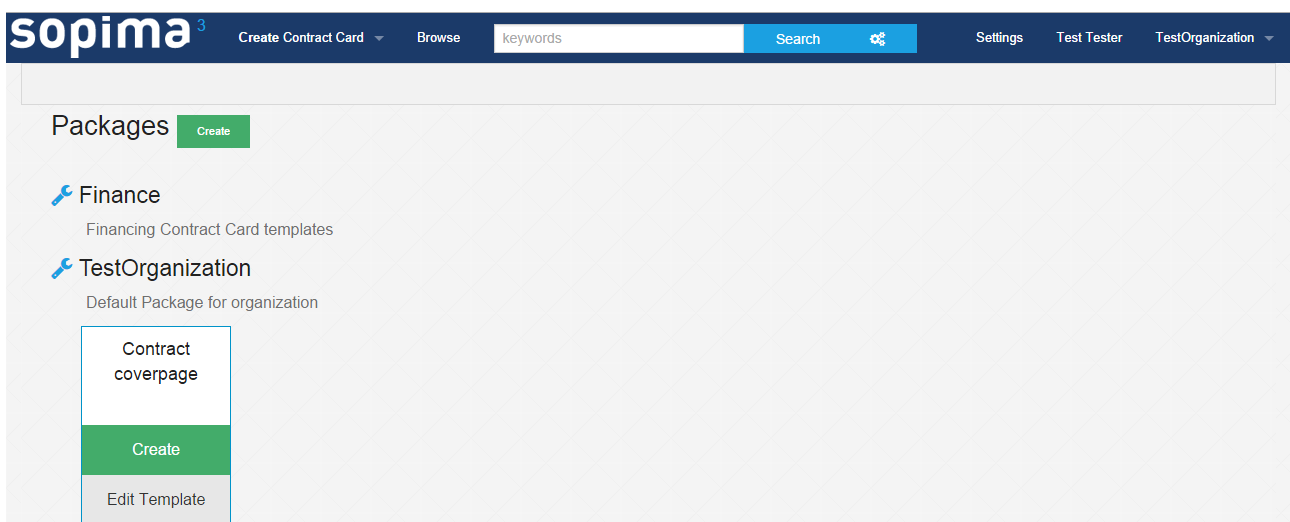


Picture 78. Sopima website – the Create menu.

In our demo you can now see the newly created Contract Card template called “Contract coveragepage” under the “TestOrganization” package.

You can create a new Contract Card based on this template by clicking on the “Create” button but that is cover later in this user manual.

For now let’s still continue editing this template by clicking on the “Edit Template” button.



Picture 79. Sopima website – The Packages and their Contract Card templates visible.

Add another section by clicking on the “Add” button from the bottom of the page.

In our demo we have created a section called “Contact persons at Contracting party” which contains a Text list type component.

Add a description for the field. In our demo we have set “Add here the contact persons, 1 to 5”.

List components allow the user to add zero or many fields of the same type to the Contract Card.

You can set the minimum and maximum amounts allowed on the template. In our demo we have set that one text field is the minimum and five is the maximum amount.

Groups

× Administrators × Finance

Add components

Text Date Currency Resource Number Boolean

Text List Date List Currency List Resource List Number List Boolean List

Contact persons at Contracting party

text list

Add here the contract persons, 1 to 5

☐ Locked

REQUIRES

Minimum amount 1

Maximum amount 5

Add components

Text Date Currency Resource Number Boolean

Text List Date List Currency List Resource List Number List Boolean List

Sections

Add

Picture 80. Sopima website – Edit existing Contract Card template. Add Text List type.

Press the “Save” button.

Notice that Sopima asks you if you want to update all the existing Contract Cards based on this template and enables you to choose from two options:

-update with deletion (add, change and delete sections/components)

-or update without deletion (add and change sections/component but do not delete sections/components).

Now choose “Fill” mode at the top of the page so you can see how a list component works.

Notice how you can now add and remove text fields for the “Contact persons at Contracting party” section by clicking the blue plug sign or red minus sign next to the text fields.

This way you can give many contact persons for the Contract Card based on this template.

The screenshot displays a web interface for contract management. It features several sections with input fields:

- Year value:** A text input field containing '0' and a label 'eur'.
- Contract dates:** A section containing three date input fields:
 - Signing:** A date input field with a red dotted border, containing '24.8.2014'.
 - Termination:** A date input field containing '24.8.2014'.
 - Check-up:** A date input field containing '24.8.2014'.
- Contact persons at Contracting party:** A section with a text input field and a label 'Add here the contract persons, 1 to 5'. To the right of the input field are two circular buttons: a red one with a minus sign and a blue one with a plus sign. A counter '0 [1-5]' is also present.

Picture 81. Sopima website – Check Contract Card template in “Fill” mode.

2.6 Contract Cards

-Create Contract Card

-Fill metadata

-Add attachments (drag & drop, upload file(s), upload folder)

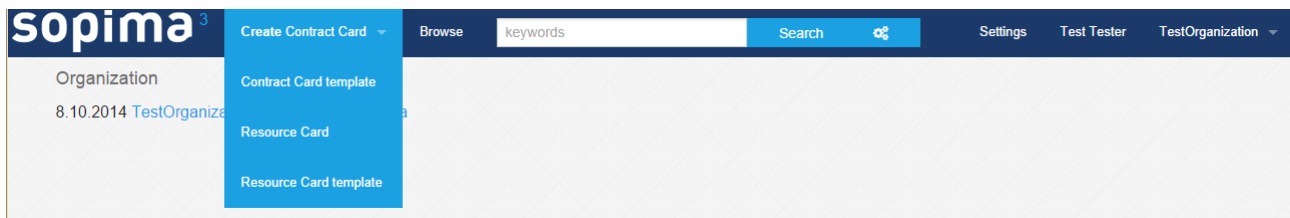
-Choose Folders

-Export to PDF (send by email)

-Save as template

-Delete Contract Card

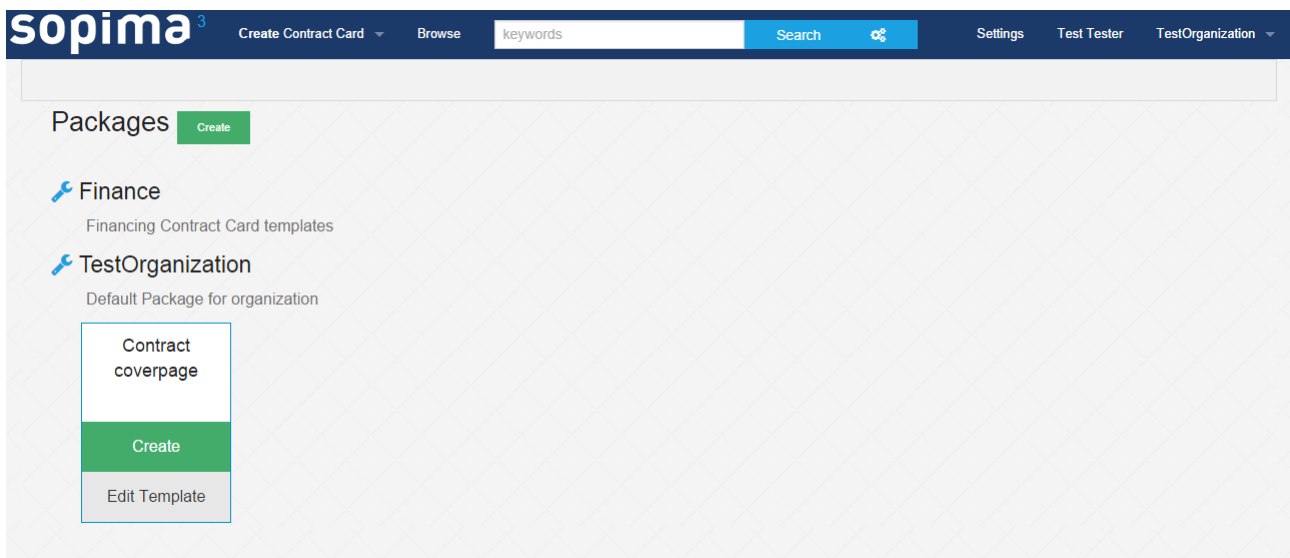
Start by choosing the “Create Contract Card” option from the Create menu at the top.



Picture 82. Sopima website – the Create menu.

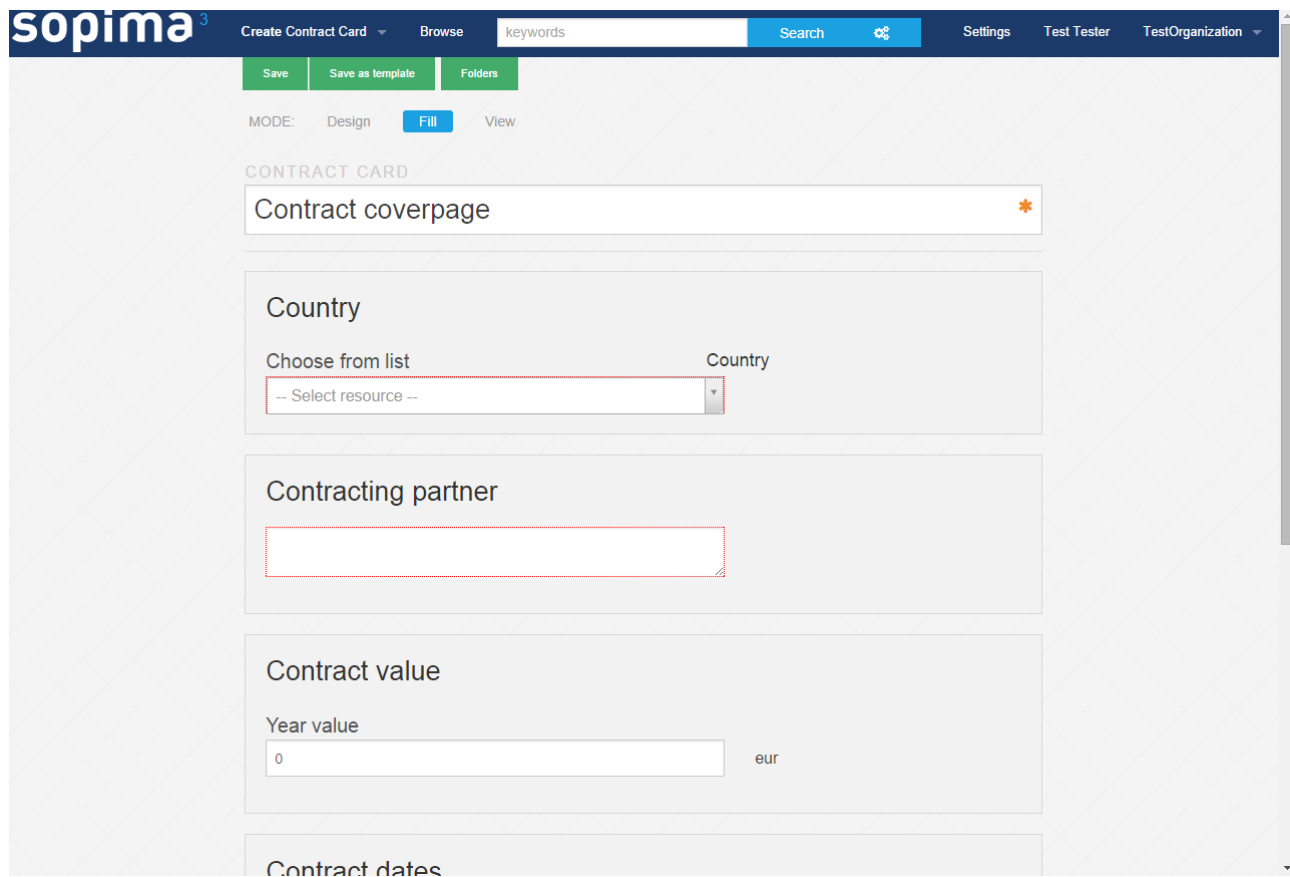
In our demo you can see a Contract Card template called “Contract coveragepage” under the “TestOrganization” package.

Click the “Create” button on that template.



Picture 83. Sopima website – Contract Card templates and Packages.

The new Contract Card based on the chosen template opens up in “Fill” mode.



Picture 84. Sopima website – Contract Card in “Fill” mode.

You can now start filling the metadata fields on the template.

In our demo we named the contract “Market research”.

We chose the country “Finland” from the drop-down menu.

We typed in “Win & Win Marketing Ltd.” as the Contracting partner.

We set the year value of the Contract Card as 125,000 euros.

You can notice that there is now an orange alert at the top of the page informing that “You have unsaved information”. This means that unless you press the “Save” button at the top of the page, all the information you have input will be lost but you can do this later.

The screenshot shows the Sopima web interface for creating a contract card. The top navigation bar includes the Sopima logo, a 'Create Contract Card' dropdown, a 'Browse' button, a search bar with the placeholder 'keywords', and links for 'Settings', 'Test Tester', and 'TestOrganization'. Below the navigation bar are buttons for 'Save', 'Save as template', and 'Folders'. An orange notification bar states 'You have unsaved information Discard'. The 'MODE' section shows 'Design', 'Fill' (selected), and 'View'. The 'CONTRACT CARD' section contains the following fields:

- Contract Card Title:** A text input field containing 'Market research'.
- Country:** A section with a 'Choose from list' dropdown showing 'Finland' and a 'Country' label.
- Contracting partner:** A text input field containing 'Win & Win Marketing Ltd.'.
- Contract value:** A section with a 'Year value' input field containing '125000' and a currency dropdown set to 'eur'.

Picture 85. Sopima website – Fill in the Contract Card title and section headers and values.

In our demo we set the Contract Card dates for a short-term contract thus it has a signing and termination dates.

We also added two attachments to the Contract Card called “Collaboration Agreement for Marketing.pdf” and “General contract terms.pdf”.

Win & Win Marketing Ltd.

Contract value

Year value
125000 eur

Contract dates

Signing
6.10.2014

Termination
31.12.2014

Check-up
24.8.2014

Files

Collaboration Agreement for marketing.pdf

General contract terms.pdf

Upload File Upload Folder OR Drag And Drop your files here

Picture 86. Sopima website – Add attachments.

Now click the “Save” button at the top of the page.

You will notice a green “Contract created” notice at the top.

sopima³ Create Contract Card Browse keywords Search Settings Test Tester TestOrganization

Save Save as template Folders **Contract created.**

MODE: Design **Fill** View

CONTRACT CARD

Market research

Country

Choose from list Country

Finland

Contracting partner

Win & Win Marketing Ltd.

Contract value

Year value

125000 eur

Contract dates

Picture 87. Sopima website – Save Contract Card.

Next click on the “Folders” button at the top.

sopima³ Create Contract Card Browse keywords Search Settings Test Tester TestOrganization

Visibility

All folders

-- Select folder--
Financing
Purchases

Selected folders

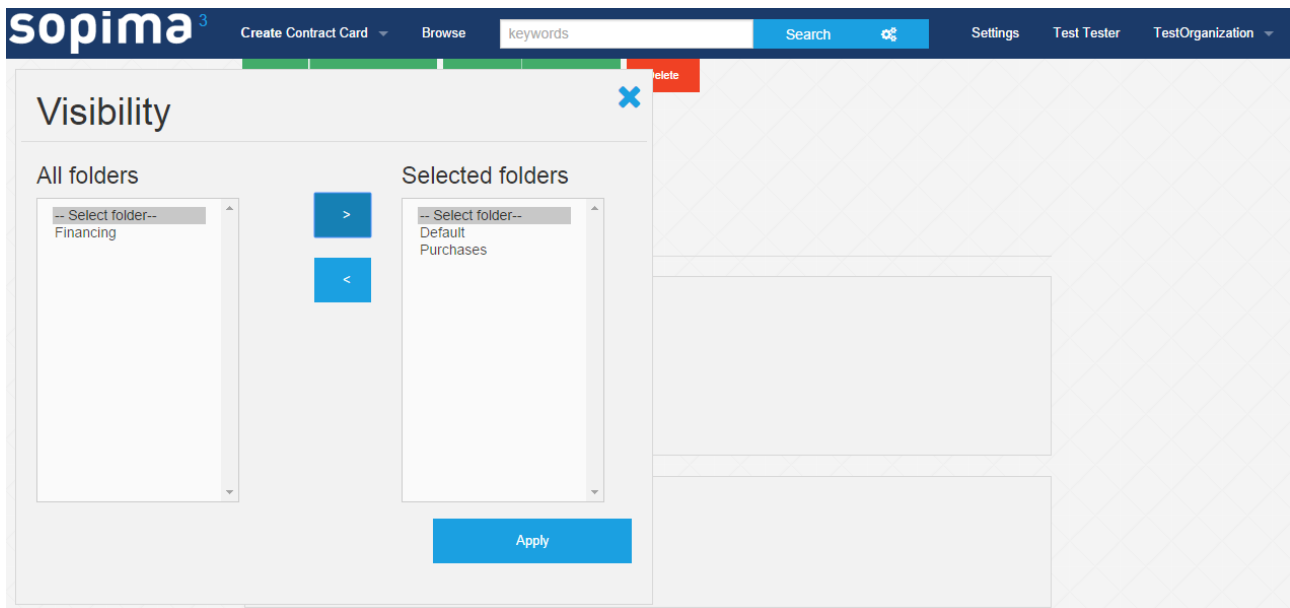
-- Select folder--
Default

Apply

Delete

Picture 88. Sopima website – Before choose Folders.

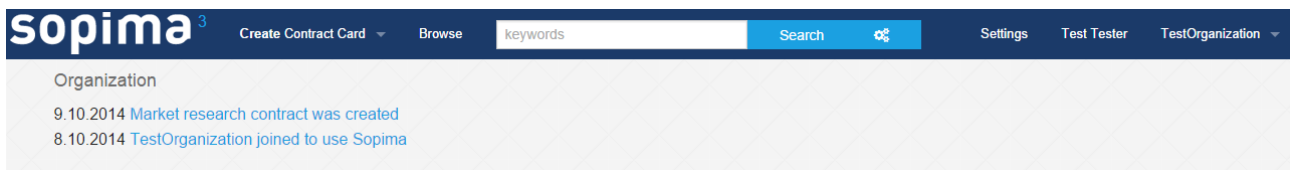
Set the Contract to belong to the “Purchases” Folder and click “Apply”.



Picture 89. Sopima website – After choose Folders.

Return to the Front page and you will that a new Contract Card called “Market research” has been created.

You can click on that link to open the Contract Card or use the search functions in Sopima as described in this user manual.



Picture 90. Sopima website – Front page shows the latest created Contract Cards.

2.7 Search for Contract Cards

2.7.1 Free text search

The free text search is useful when you do not know exactly where to look for your Contract Cards like in a Folder (the Browse function). It will give you a list of results which you can further narrow down with the advanced search feature described later in this user manual.

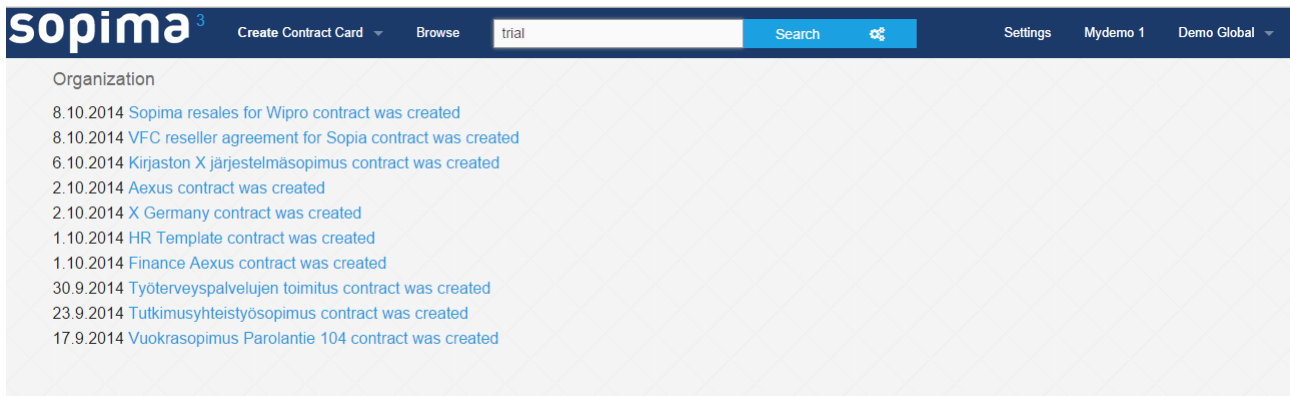
Wildcard character (*) is automatically added to the end of a search word

In Sopima the wildcard character (*) is automatically added to the end of a search word. Thus the search word “mat” will find the Contract cards where words such as “material” and “materials” exist for example.

Wildcard character (*) is not used in the beginning of a search word

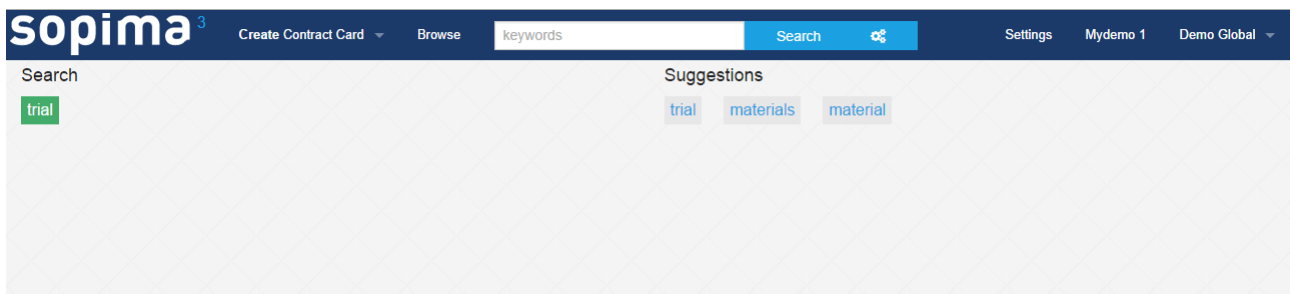
For optimization reasons Sopima does not support wildcard character (*) in the beginning of a search word. On the other hand Sopima will always try to suggest search words that can find results.

Write keyword(s) in the text box at the top and click on the “Search” button.



Picture 91. Sopima website – Free text search.

The keyword “trial” did not find anything in our demo but Sopima suggests that we try with “materials” or “material” keywords.

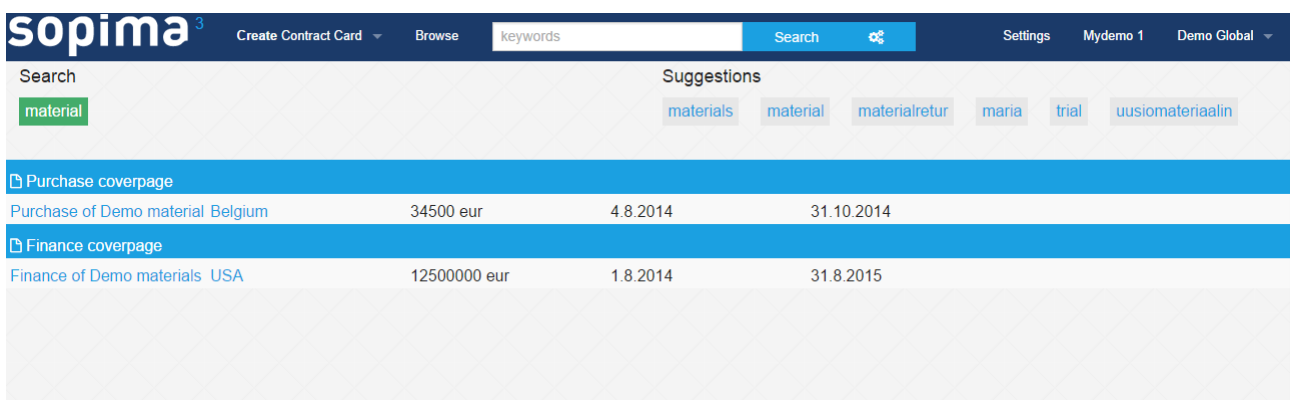


Picture 92. Sopima website – Suggestions for better search words shown on the right.

Let’s click on the “material” keyword.

Two Contract Cards are found.

Notice that they belong to different Contract Card templates called “Purchase coveragepage” and “Finance coveragepage”.



Picture 93. Sopima website – Use selected one of the suggestions .

The words in a search phrase are treated as separate words, not as a sentence

Sopima treats the words in the search phrase “sales material” as separate words, not a sentence. Thus in the case of our demo Sopima would find Contract cards where the word “sales” or “material” or both exist.

Try this by searching next with the keywords “sales” and “material”.

The screenshot shows the Sopima website interface. At the top, there's a navigation bar with 'sopima' logo, 'Create Contract Card', 'Browse', a search bar containing 'sales material', and a 'Search' button. Below the search bar, there are 'Suggestions' for 'materials', 'material', 'materialretur', 'maria', 'trial', and 'uusiomateriaalin'. The search results are categorized into 'Purchase coverage' and 'Finance coverage'. Under 'Purchase coverage', there is a row for 'Purchase of Demo material Belgium' with a value of 34500 eur, a date of 4.8.2014, and a termination date of 31.10.2014. Under 'Finance coverage', there is a row for 'Finance of Demo materials USA' with a value of 12500000 eur, a date of 1.8.2014, and a termination date of 31.8.2015.

Picture 94. Sopima website – More than one keyword used in search.

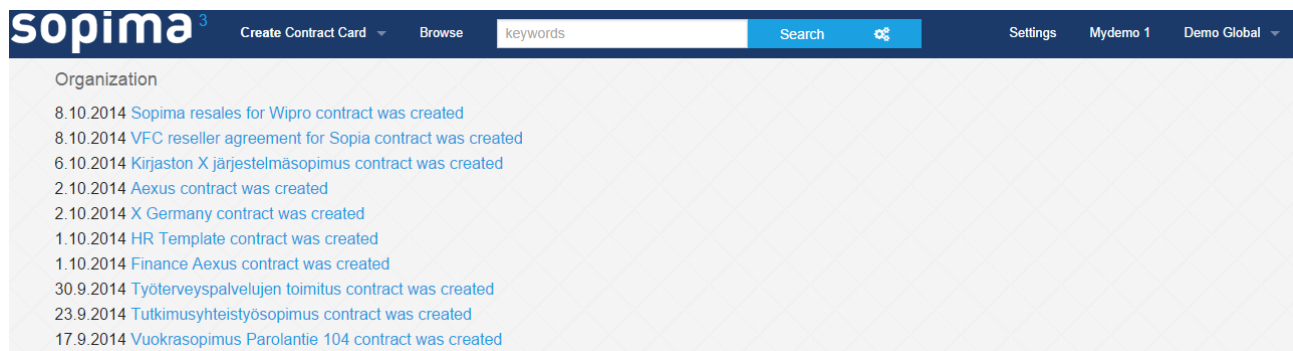
The results will include Contract Cards that contain either “sales” or “material” or both in them.

The screenshot shows the Sopima website interface. At the top, there's a navigation bar with 'sopima' logo, 'Create Contract Card', 'Browse', a search bar containing 'keywords', and a 'Search' button. Below the search bar, there are 'Suggestions' for 'sales', 'materials', 'material', 'materialretur', 'maria', 'trial', and 'uusiomateriaalin'. The search results are categorized into 'Contract coverage', 'Purchase coverage', 'Finance coverage', and 'HR Template'. Under 'Contract coverage', there are rows for 'Partnership agreement with Netherlands Aexus' (12 eur, 15.9.2014, 28.2.2015), 'Sales of demoware Finland' (125000 eur, 15.9.2014, 31.12.2014), 'Sales of Demo factory Norway' (25000000 eur, 6.1.2014, 30.6.2018), and 'Sales of Demo product Sweden' (50000 eur, 1.9.2014, 31.12.2015). Under 'Purchase coverage', there is a row for 'Purchase of Demo material Belgium' (34500 eur, 4.8.2014, 31.10.2014). Under 'Finance coverage', there is a row for 'Finance of Demo materials USA' (12500000 eur, 1.8.2014, 31.8.2015). Under 'HR Template', there is a row for 'Employee agreement Nicole Mooren'.

Picture 95. Sopima website – The search finds results for all the keywords separately, not as a phrase.

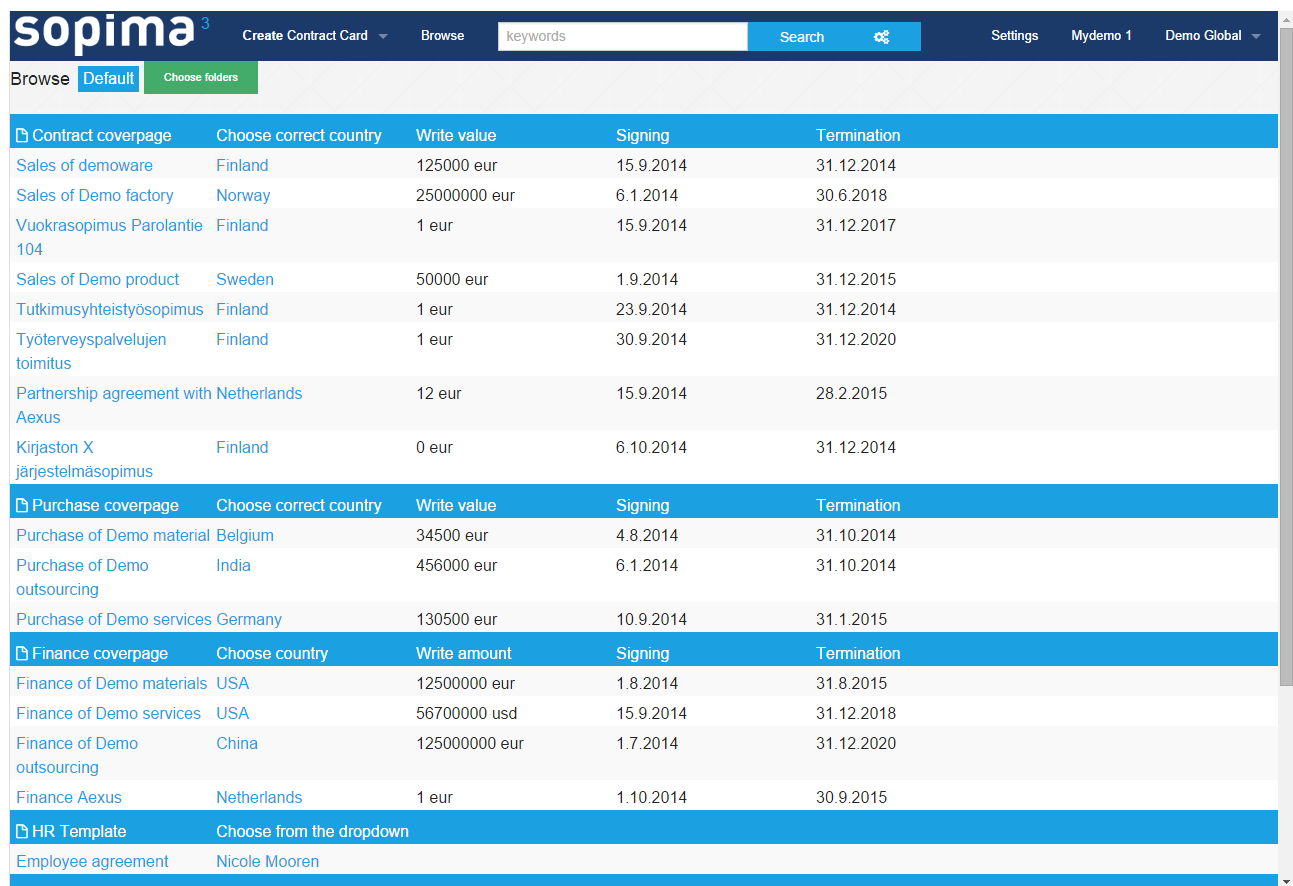
2.7.2 Browse Folders

Click on the “Browse” button at the top.



Picture 96. Sopima website – Front page shows the latest created Contract Cards.

Every Contract Card belongs to the Default Folder. So selecting this Folder will show you all the Contract Cards.



Picture 97. Sopima website – Browse - Default Folder shows all Contract Cards.

Click on the “Choose folders” button.

Selected Folders have a blue color.

Deselect the “Default” Folder by clicking on it.

Select “Sales” Folder by clicking on it.

Finally click the “Show” button.

The screenshot shows the Sopima web interface. A 'Show folders' modal is open on the left, displaying a list of folders: Finland, Financing, Default, Sales (highlighted in blue), and India. Each folder has edit and delete icons. A 'Show' button is at the bottom of the modal. Below the modal, a table of contract cards is visible. The table has columns for 'Contract coverage', 'Choose correct country', 'Write value', 'Signing', and 'Termination'. The first section of the table lists various contract types like 'Sales of demoware', 'Sales of Demo factory', etc. The second section is titled 'Sopima resales contract card template' and shows a row for 'Sopima resales for Wipro' with values for year, signing, and termination.

Contract coverage	Choose correct country	Write value	Signing	Termination
Sales of demoware	Finland	125000 eur	15.9.2014	31.12.2014
Sales of Demo factory	Norway	25000000 eur	6.1.2014	30.6.2018
Sales of Demo product	Sweden	50000 eur	1.9.2014	31.12.2015
Työterveyspalvelujen toimitus	Finland	1 eur	30.9.2014	31.12.2020
Kirjaston X järjestelmäsopimus	Finland	0 eur	6.10.2014	31.12.2014
Sopima resales contract card template				
Sopima resales for Wipro	25000 eur	6.10.2014	7.10.2015	

Picture 98. Sopima website – Browse – Show Folders.

You are shown all the Contract Cards in the “Sales” Folder.

The screenshot shows the Sopima web interface with the 'Browse' view selected. The 'Sales' folder is highlighted in the left sidebar. The main table displays contract cards for the 'Sales' folder. The table has columns for 'Contract coverage', 'Choose correct country', 'Write value', 'Signing', and 'Termination'. The first section of the table lists various contract types like 'Sales of demoware', 'Sales of Demo factory', etc. The second section is titled 'Sopima resales contract card template' and shows a row for 'Sopima resales for Wipro' with values for year, signing, and termination.

Contract coverage	Choose correct country	Write value	Signing	Termination
Sales of demoware	Finland	125000 eur	15.9.2014	31.12.2014
Sales of Demo factory	Norway	25000000 eur	6.1.2014	30.6.2018
Sales of Demo product	Sweden	50000 eur	1.9.2014	31.12.2015
Työterveyspalvelujen toimitus	Finland	1 eur	30.9.2014	31.12.2020
Kirjaston X järjestelmäsopimus	Finland	0 eur	6.10.2014	31.12.2014
Sopima resales contract card template				
Sopima resales for Wipro	25000 eur	6.10.2014	7.10.2015	

Picture 99. Sopima website – Browse – One Folder selected.

2.7.3 Advanced search

The advanced search allows you look for Contract Cards based on a chosen template and a combination of one or many of its components (metadata fields).

Start by clicking on the blue gears button on the right side of the “Search” button.

You will see the Advanced search page with nothing selected yet.

Picture 100. Sopima website – Advanced search.

First choose a template from the corresponding drop-down menu.

Picture 101. Sopima website – Advanced search – Choose Contract Card template.

Next choose a component from the corresponding drop-down menu.

Advanced search

Template	Component	Operator	Value
Contract coveragepage	Choose correct country		

Picture 102. Sopima website – Advanced search – Choose component (metadata field belonging to the chosen template).

Next choose an operator from the corresponding drop-down menu.

For dates this is: on, before, after.

For values this is <, <=, =, >= and >.

Advanced search

Template	Component	Operator	Value
Contract coveragepage	Signing		click to show datepicker

Picture 103. Sopima website – Advanced search – Choose operator.

Next write or choose the value from corresponding text box.

Advanced search

Template	Component	Operator	Value
Contract coveragepage	Signing	after	click to show datepicker

October 2014

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Picture 104. Sopima website – Advanced search – Choose value.

In our demo we have first chosen “Contract coverage” template, the “Signing” date component, an operator called “after” and a value of 1.1.2014.

Template	Component	Operator	Value	
Contract coverage	Signing	after	1.1.2014	+

Picture 105. Sopima website – Advanced search – Search criteria ready.

Now press the blue plus sign in the last column on the current row.

This means that we want to find all Contract Cards for the “Contract coverage” template which have a “Signing” date whose value is after 1.1.2014.

Press the “Search” button below.

You are show the Contract Cards based on this template that match the criteria you have set above.

Contract coverage	Choose correct country	Write value	Signing	Termination
Sales of demoware	Finland	125000 eur	15.9.2014	31.12.2014
Sales of Demo factory	Norway	25000000 eur	6.1.2014	30.6.2018
Vuokrasopimus Parolantie 104	Finland	1 eur	15.9.2014	31.12.2017
Sales of Demo product	Sweden	50000 eur	1.9.2014	31.12.2015
Tutkimusyhteistyösopimus	Finland	1 eur	23.9.2014	31.12.2014
Työterveyspalvelujen toimitus	Finland	1 eur	30.9.2014	31.12.2020
Partnership agreement with Netherlands Aexus		12 eur	15.9.2014	28.2.2015
Kirjaston X järjestelmäsopimus	Finland	0 eur	6.10.2014	31.12.2014

Picture 106. Sopima website – Advanced search – Search results shown for one criteria.

Next you can add second search criteria by filling a new search row.

In our demo we chose the operator called “before” and set the value to 28.2.014

Press the blue plus sign in the last column on the current row.

This means that we want to find all Contract Cards for the “Contract coverage” template which have a “Signing” date whose value is after 1.1.2014 and before 28.2.2014.

Press the “Search” button below.

You are show the Contract Cards based on this template that match the two criterias you have set above.

Advanced search

Template	Component	Operator	Value	
Contract coverage	Signing	>	1.1.2014	+
Contract coverage	Signing	<	28.2.2014	+
Contract coverage	Signing	before	28.2.2014	+

Search

Contract coverage	Choose correct country	Write value	Signing	Termination
Sales of Demo factory	Norway	25000000 eur	6.1.2014	30.6.2018

Picture 107. Sopima website – Advanced search – Search results shown for two criterias.

Next you can add new search criteria by filling a third search row.

In our demo we chose the component “Write value” which means Contract Card value in the template. We chose the operator greater then ‘>’ and set a value of 100,000.

Press the blue plus sign in the last column on the current row.

This means that we want to find all Contract Cards for the “Contract coverage” template which have a “Signing” date whose value is after 1.1.2014 and before 28.2.2014 and a year value greater than 100,000 euros.

Press the “Search” button below.

You are show the Contract Cards based on this template that match the three criterias you have set above.

Template	Component	Operator	Value	
Contract coverage	Signing	>	1.1.2014	
Contract coverage	Signing	<	28.2.2014	
Contract coverage	Write value	>	100000	
Contract coverage	Write value	more then	100000	

Contract coverage	Choose correct country	Write value	Signing	Termination
Sales of Demo factory	Norway	25000000 eur	6.1.2014	30.6.2018

Picture 108. Sopima website – Advanced search – Search results shown for three criterias.

2.8 Email templates

-Invite user template

-Notification template for dates and currencies

Start by clicking on the “Settings” menu item at the top.

Organization

- 9.10.2014 Market research contract was created
- 8.10.2014 TestOrganization joined to use Sopima

Picture 109. Sopima website – Front page.

You are first presented the Groups page.

Group name	Members	Operations
Administrators	1	Edit members Edit permissions
Readers	1	Edit members
Finance	0	Edit members Edit permissions Delete

Picture 110. Sopima website – Settings (Groups).

Click on the “Email templates” link on the left side of the page.

Picture 111. Sopima website – Settings\Email templates.

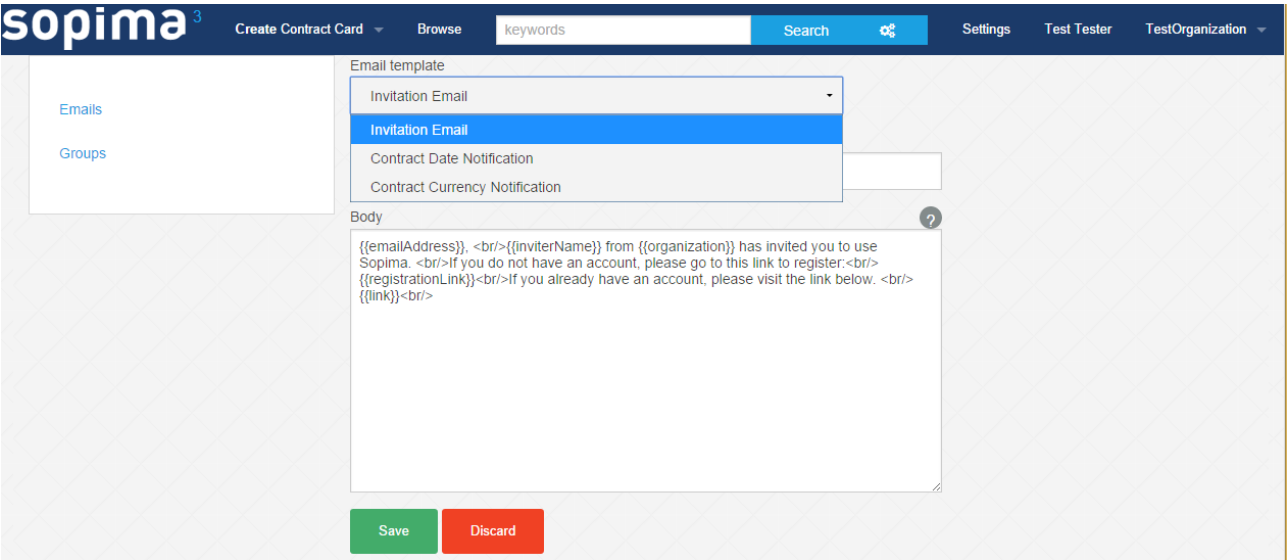
You can modify three different templates. Choose from the “Email template” drop-down menu either:

- Invitation email
- Contract Date Notification or
- Contract Currency Notification.

Below you will see the template for the “Invitation email”.

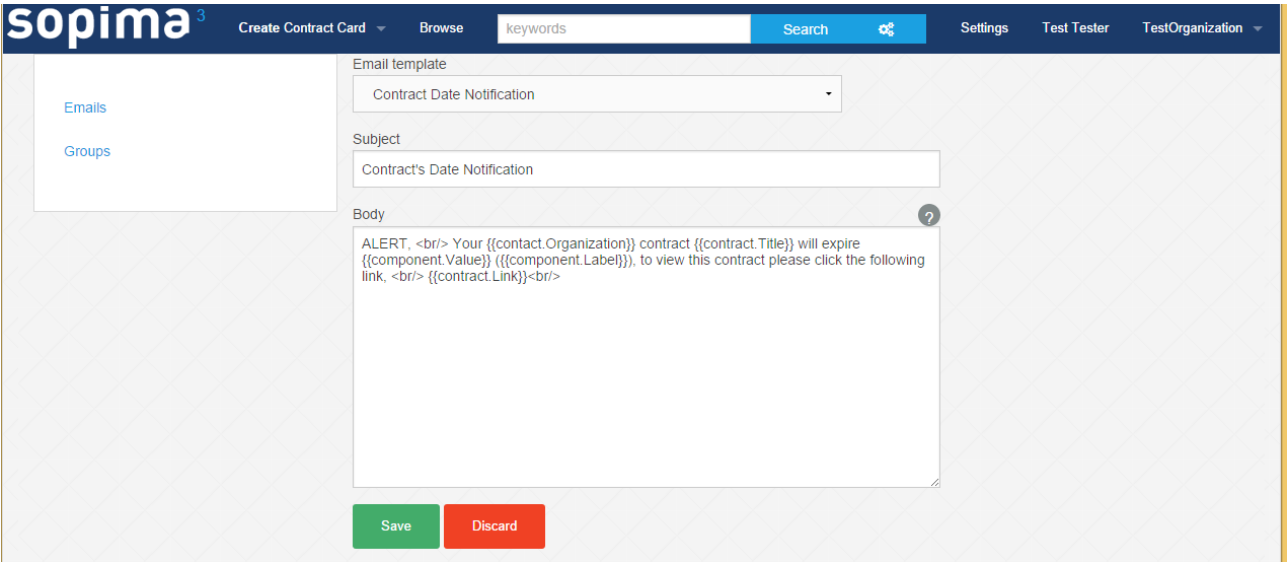
You can write anything on the “Body” text box that you want to be seen on the email including HTML tags like
 for line break etc.

Notice how certain elements are surrounded by two wave “{{” and “}}” symbols. These are dynamic metadata fields that are filled automatically from the Contract Card that generates the notification email.



Picture 112. Sopima website – Settings\Email templates – Invitation/Date/Currency templates

Below you will see the template for the “Contract Date Notification”.



Picture 113. Sopima website – Settings\Email templates – Contract Date Notification template.

Below you will see the template for the “Contract Currency Notification”.

The screenshot shows the Sopima web interface for editing email templates. On the left is a sidebar with 'Emails' and 'Groups' links. The main area has a header with navigation links: 'Create Contract Card', 'Browse', a search bar, and 'Settings', 'Test Tester', 'TestOrganization'. The 'Email template' dropdown is set to 'Contract Currency Notification'. Below it, the 'Subject' is 'Contract's Currency Notification'. The 'Body' contains a template: 'ALERT,
your {{contact.Organization}} contract {{contract.Title}} have amount {{component.CurrencySymbol}}{{component.Amount}} ({{{component.Label}}}), to view this contract please click the following link
{{contract.Link}}'. At the bottom are 'Save' and 'Discard' buttons.

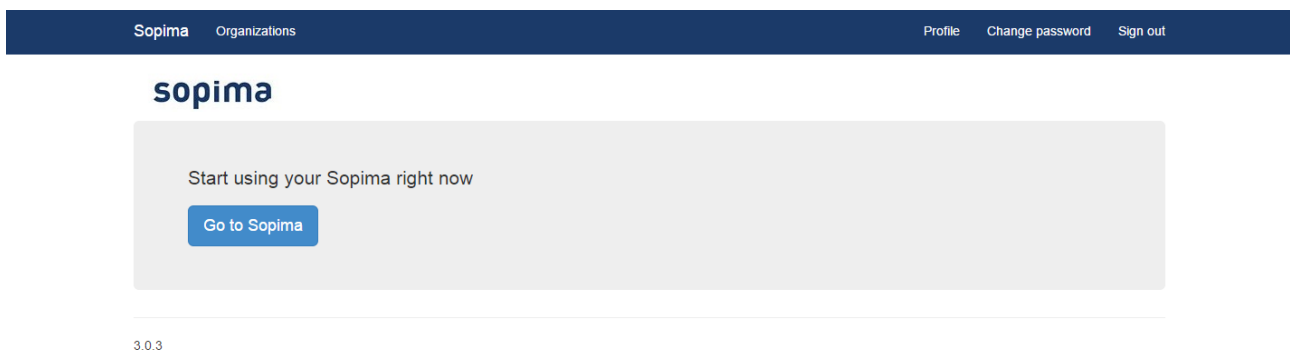
Picture 114. Sopima website – Settings\Email templates – Contract Currency Notification template.

3 Reporting and analysis in Microsoft Excel

Sopima uses Microsoft Power Query for Excel. You can fetch the Contract Card data that you want and drill through the data in Excel. Create charts and graphs from the data in a familiar Excel environment.

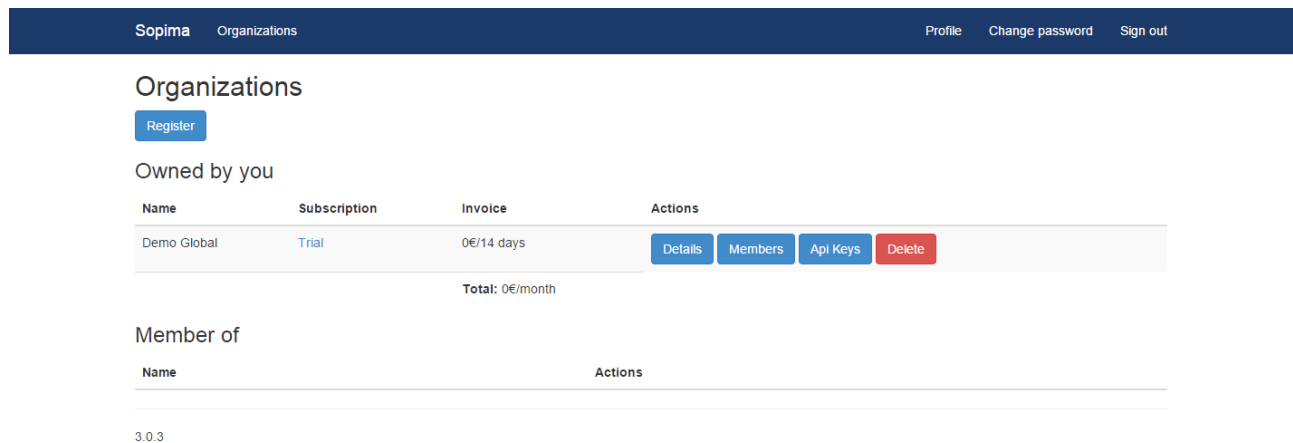
3.1 Generate API key on Identity website

Go to the Identity website and choose Organizations.



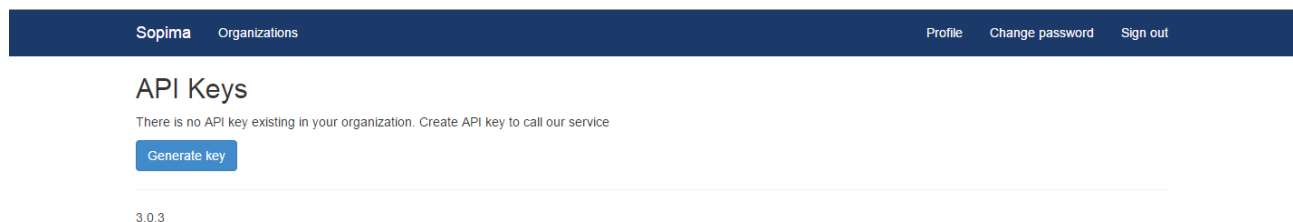
Picture 115. Identity website – Front page.

Click on the “API keys” button next to the organization you want to fetch data from.



Picture 116. Identity website – Organizations.

Click on the “Generate key” button.



Picture 117. Identity website – API Keys.

Give the API key a descriptive name. In our example we have used the name DemoGlobal.

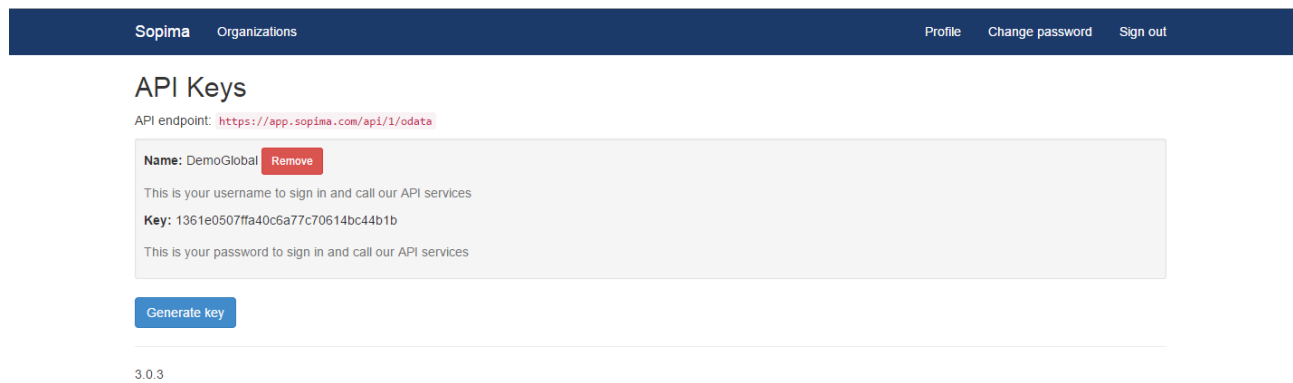
Click on Save.



Picture 118. Identity website – Create API key.

You are presented with the address (URL) for the Excel Power Query connection as well as the organization specific name (username) and key (password) for the Excel Power Query authentication.

You can always return to this page by clicking on the “API Keys” button next to an organization on the organizations page.



Picture 119. Identity website – Name and key generated for the Excel Power Query authentication.

3.2 Install Microsoft Power Query for Excel

Go to the Microsoft download page for Power Query for Excel:

<http://office.microsoft.com/en-us/excel/download-microsoft-power-query-for-excel-FX104018616.aspx>

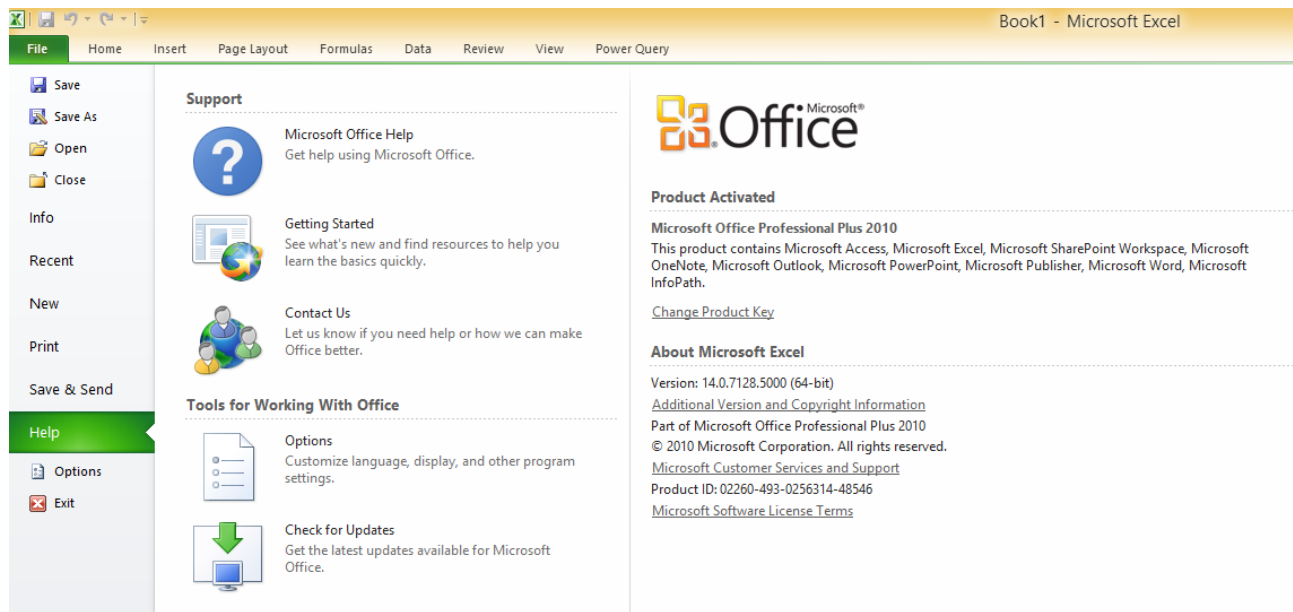
The following Office versions are supported:

- Microsoft Office 2013 Professional Plus, Office 365 ProPlus or Excel 2013 Standalone
- Microsoft Office 2010 Professional Plus with Software Assurance
 - *Note: You must have Software Assurance for Office Professional Plus through Volume Licensing in Office 2010*

Microsoft Power Query for Excel requires Internet Explorer 9 or greater.

Microsoft Power Query for Excel is available for 32-bit (x86) and 64-bit (x64) platforms, your selection must match architecture of the installed version of Office.

You can check your Office architecture by opening Excel and clicking on the File menu and then Help. In the “About Microsoft Excel” section on the right it will read either (32-bit) or (64-bit). That is your Office architecture.



Picture 120. Microsoft Excel – Check your Office architecture.

Click the link below and choose which platform, 32-bit (x86) or 64-bit (x64), to download:

<http://office.microsoft.com/en-us/excel/redir/XT104091747.aspx>

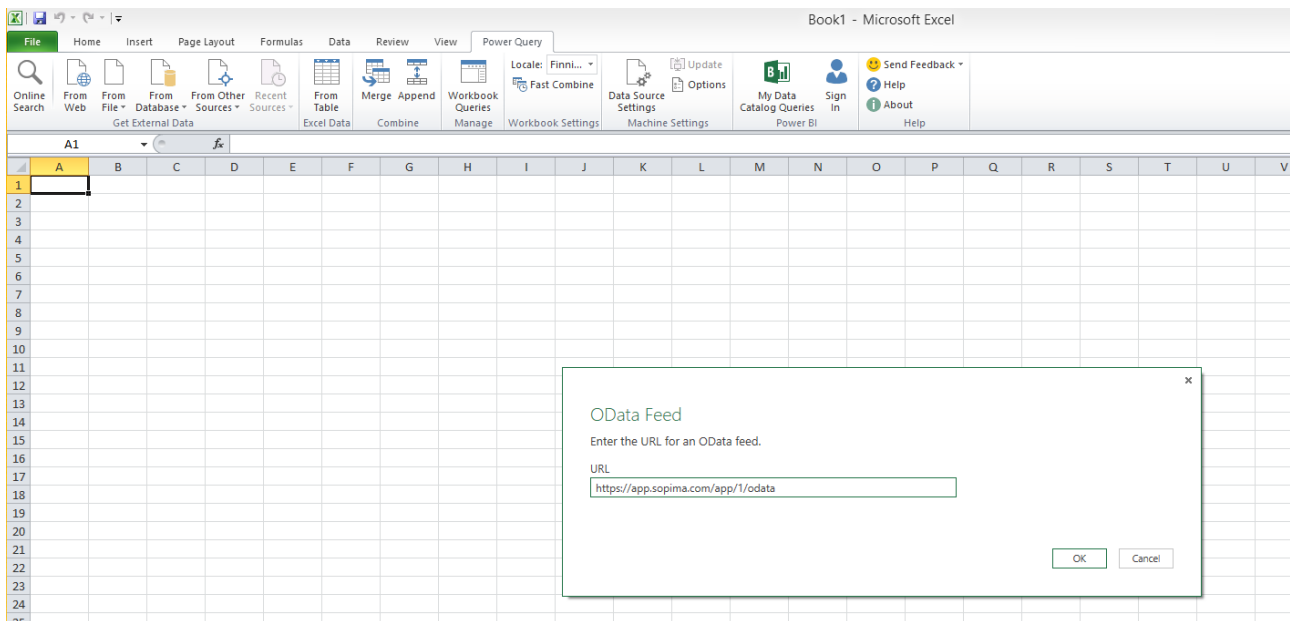
3.3 Set Data Source for Power Query

Click on the Power Query tab at the top.

Click on “From Other Sources” menu and choose “From OData Feed”.

Write the URL of the Sopima OData Feed here: <https://app.sopima.com/api/1/odata/>.

Press OK.

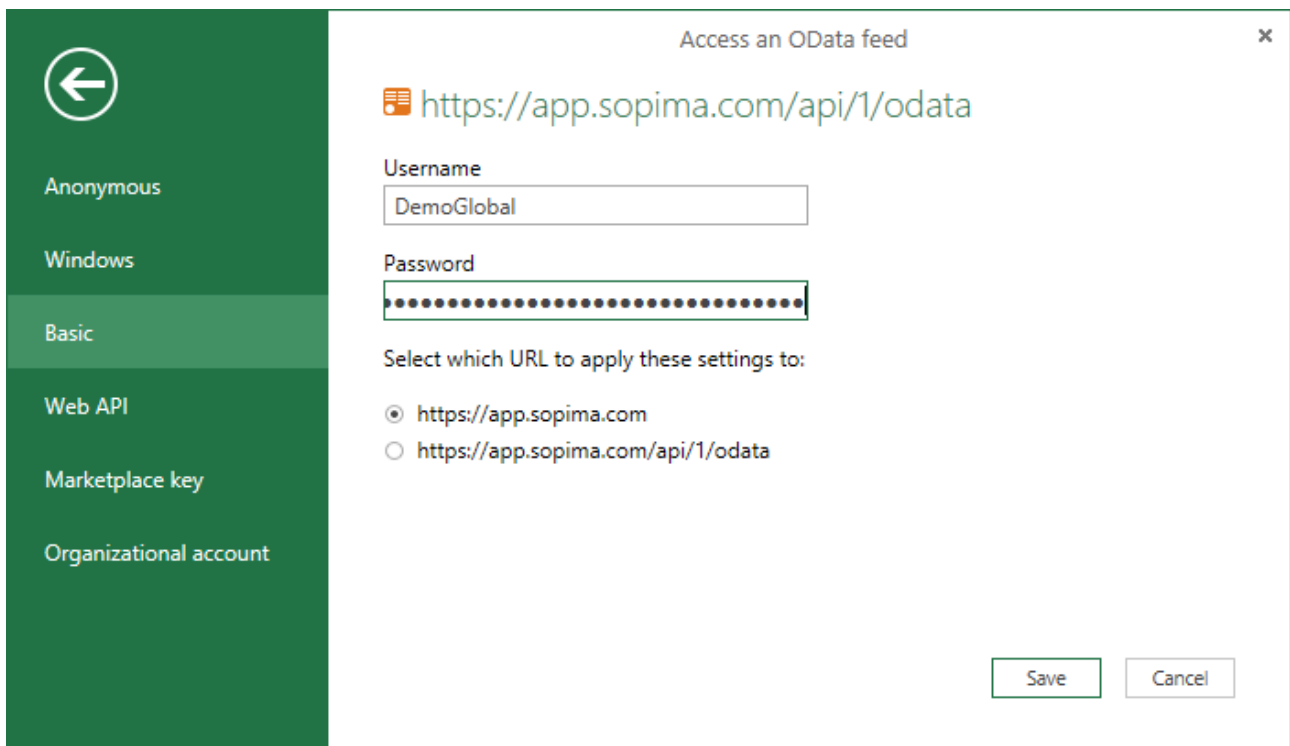


Picture 120. Microsoft Excel – Choose OData Feed.

Next choose an authentication option called “Basic” from the left.

Write the username and password that you created with the API key.

Click Save.

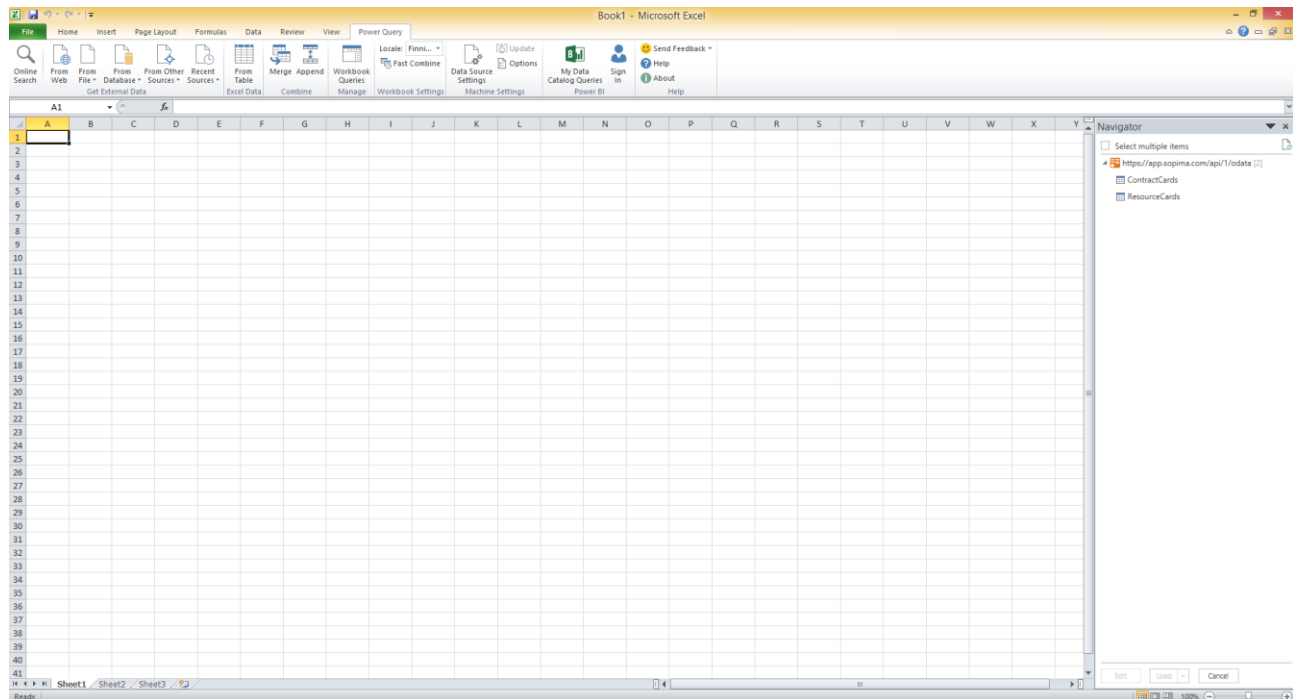


Picture 121. Microsoft Excel – Basic authentication.

3.4 Fetch data from Sopima to local Excel worksheet

On the left side you will now find the Navigator pane with Contract Cards and Resource Card as options.

Double-click on the Contract Cards or Resource Cards that you want to fetch from Sopima to your local Excel worksheet.

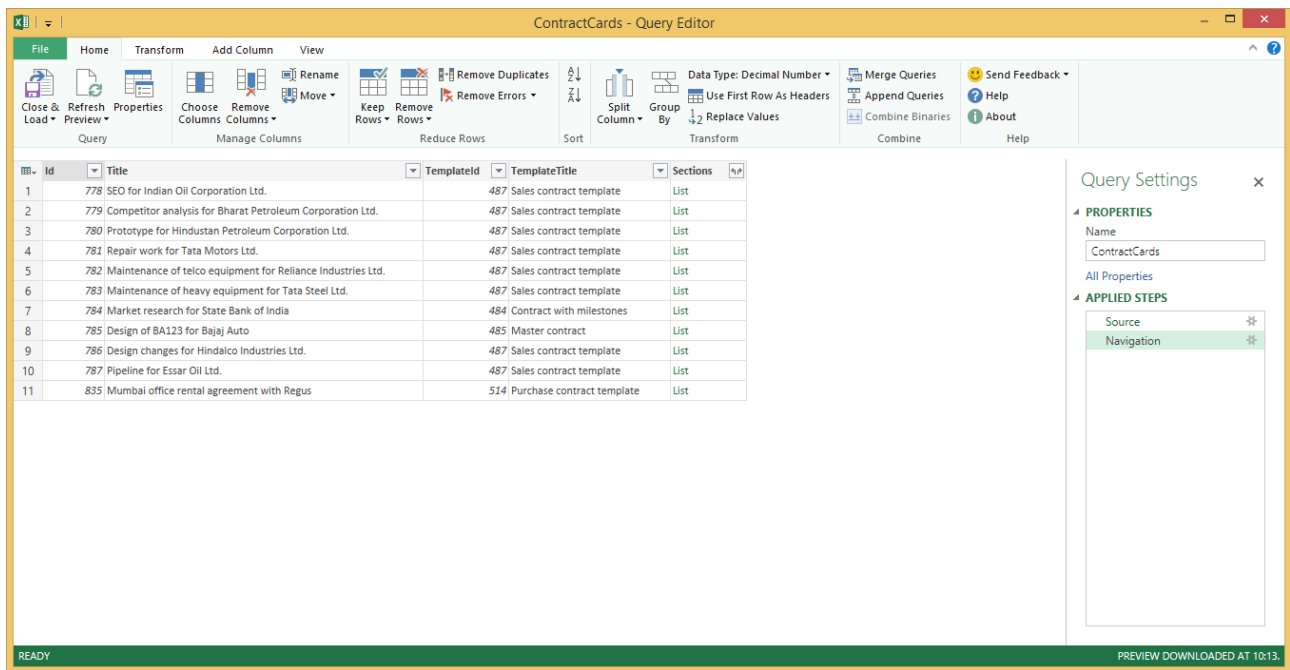


Picture 122. Microsoft Excel – Connection established.

A Query Editor opens.

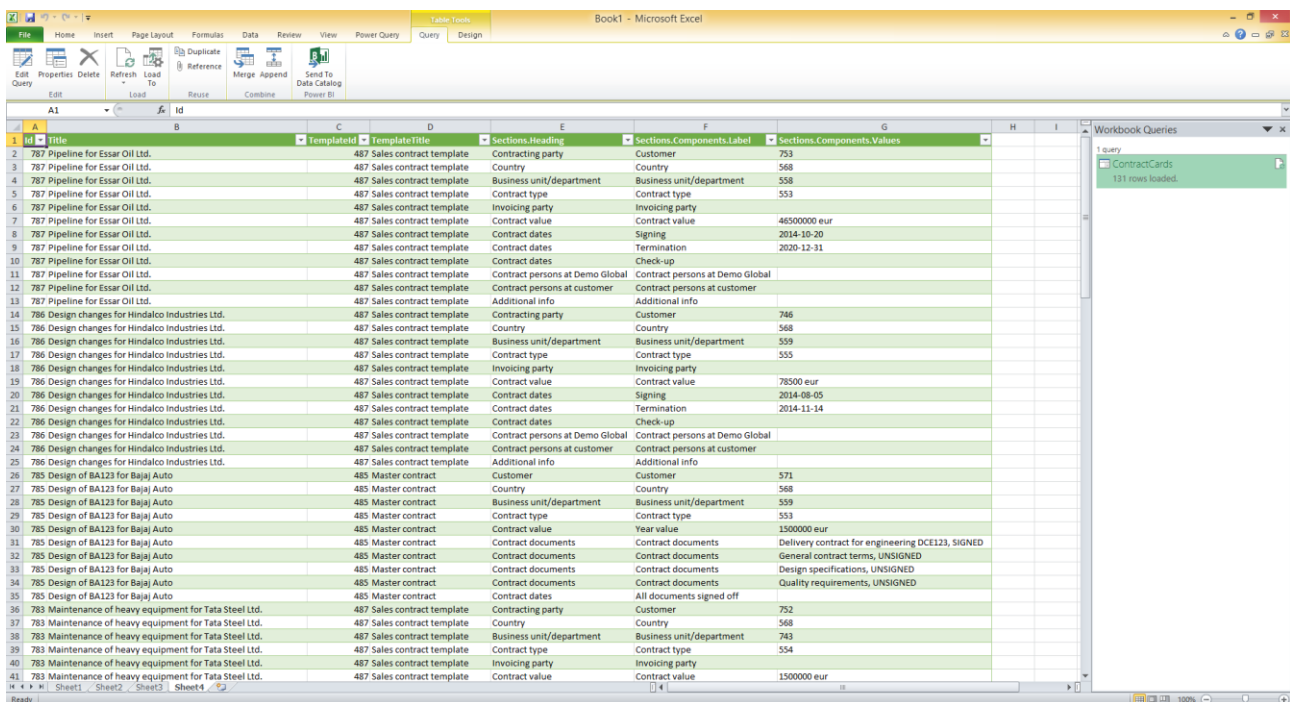
You can filter the results and change the order of columns in this editor.

When you are done click on the Close & Load button in the left upper corner and the chosen data and its form is stored on your local Excel worksheet.



Picture 123. Microsoft Excel – Query Editor for Contract Cards.

Now you have local storage of the data in your Excel worksheet and you can perform analysis on it and create graphs and charts from the data.



Picture 124. Microsoft Excel – Data loaded to local Excel worksheet.